USER'S MANUAL

Analytics on Demand (AOD)

Gale, a part of Cengage Learning

July, 2014, v1b

Revision Sheet

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Rev. 1	7/7/14	AOD User's Manual Initial Release
Rev. 1a	7/8/14	Minor screen image changes and corrections
Rev. 1b	7/28/14	Copy edits/formatting

AOD USER'S MANUAL

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1.0 GENERAL INFORMATION

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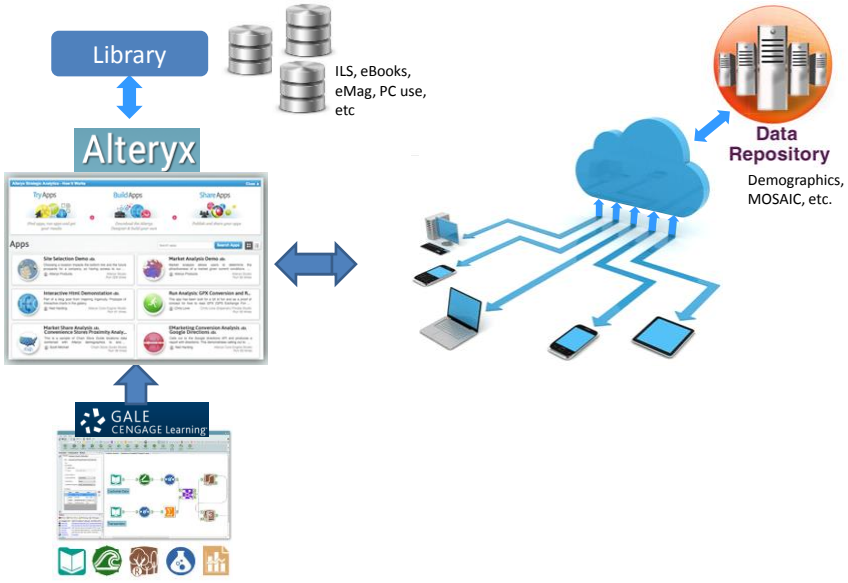
1.1 System Overview

Analytics on Demand (AOD) is a web-based access product, whereby a library subscribes to specific software applications (hereafter referred to as "apps") to analyze data extracted from electronic platforms used at their library. These platforms can be their Integrated Library System (ILS), their eBook platform(s) like OverDrive and/or 3M, their periodical platform (Zinio), or any other electronic platform that data can be extracted from.

Access to AOD is through the Analytics Gallery via a username/password. Once users log in, they can access apps that they subscribe to and execute them by uploading data files to the apps. The data files are transmitted to the cloud via an encrypted data channel, blended with external data, and analyzed, with the output in the form of an executive-style report, complete with tables, charts, and graphs; the report can be downloaded to Excel for further manipulation. These reports can be run in a multitude of variations, based on an individual library's need. There is no requirement to clean the data before it is uploaded in the app, nor is it necessary to send sensitive data outside of the library. Once the app completes, the original data file used is automatically deleted. This process is illustrated in Figure 1.

Figure 1. Analytics on Demand Network Diagram



1.2 Points of Contact

1.2.1 Customer Care

As a user of online resources from Gale, part of Cengage Learning, you are provided with an unparalleled level of personalized service and support at no extra cost to your library. Your Customer Care Consultant is with you every step of the way. Gale Customer Care is available to answer questions about:

- Running AOD apps
- Sample data sets initially validated at setup
- Training

Contact Gale Customer Care at:

- gale.customercare@cengage.com
- Or, email or call your Customer Care Consultant directly

1.2.2 Technical Support

Gale's Technical Support is available for phone support 24 hours a day.

Reach Gale Technical Support at:

- 1-800-877-4253, option 4
- gale.technicalsupport@cengage.com

For additional resources and information, visit: http://support.gale.com/

1.3 Organization of the AOD User Guide

The AOD User Guide is organized into five major sections. The first section is ***General Information.*** The second section, ***Getting Started***, provides an overview of all administrative tasks and a general overview of the system. Sections Three through Five are devoted to each AOD app.

1.4 Acronyms and Abbreviations

The following acronyms and abbreviations are used in this document:

- **AOD** – Analytics on Demand
- **CBSA** – Core Based Statistical Area
- **ILS** – Integrated Library System
- **LMS** – Library Management System

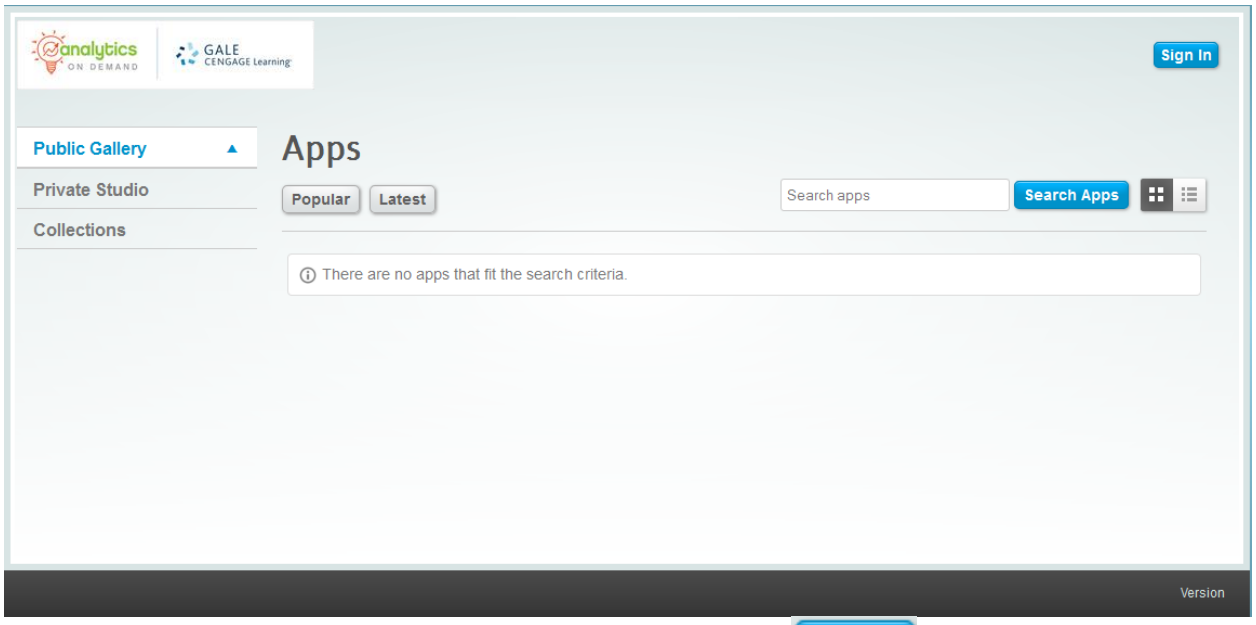
2.0 GETTING STARTED

2.0 GETTING STARTED

This section walks you through the AOD platform system from initiation through exit.

2.1 Logging On and Logging Off

Gale provides access to AOD through usernames and passwords. When you enter AOD—through the Gale- provided URL in your access letter—the following login page appears:



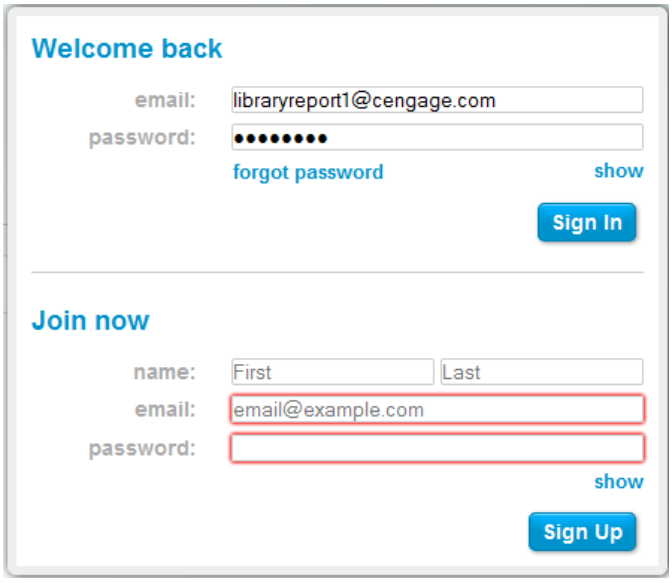
Move your cursor to the upper right corner of the screen above the

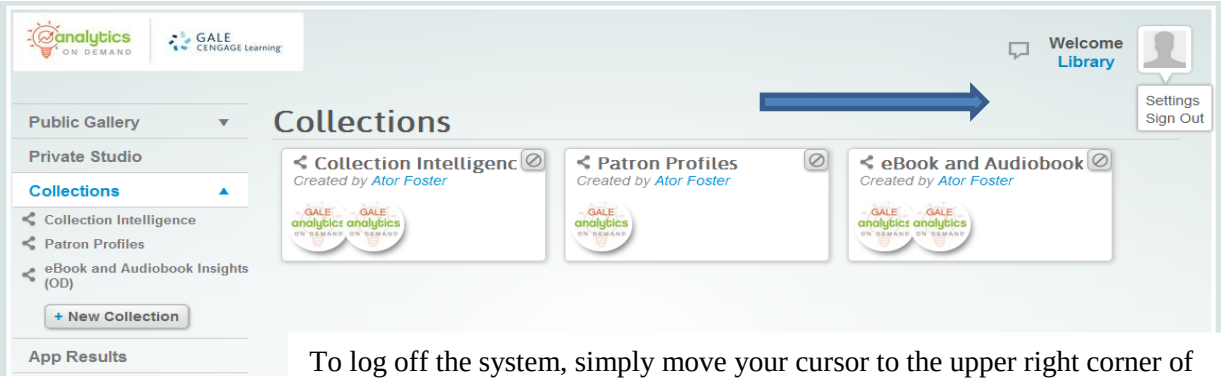
icon. Type your username and password into the box that appears and click the icon to enter AOD.

Note: The logins provided with your subscription are email addresses that allow access to the private collections as well as any other apps present in the public gallery.

Other staff members can create additional usernames that enable them to enter the public gallery, which is populated with complimentary apps provided with your paid subscription.

Examples of these complimentary apps are a Twitter Tracker and a Word Cloud app.





To log off the system, simply move your cursor to the upper right corner of the screen. A box with **Settings** and **Sign Out** options appears. Click **Sign Out**, and access to the system ends.

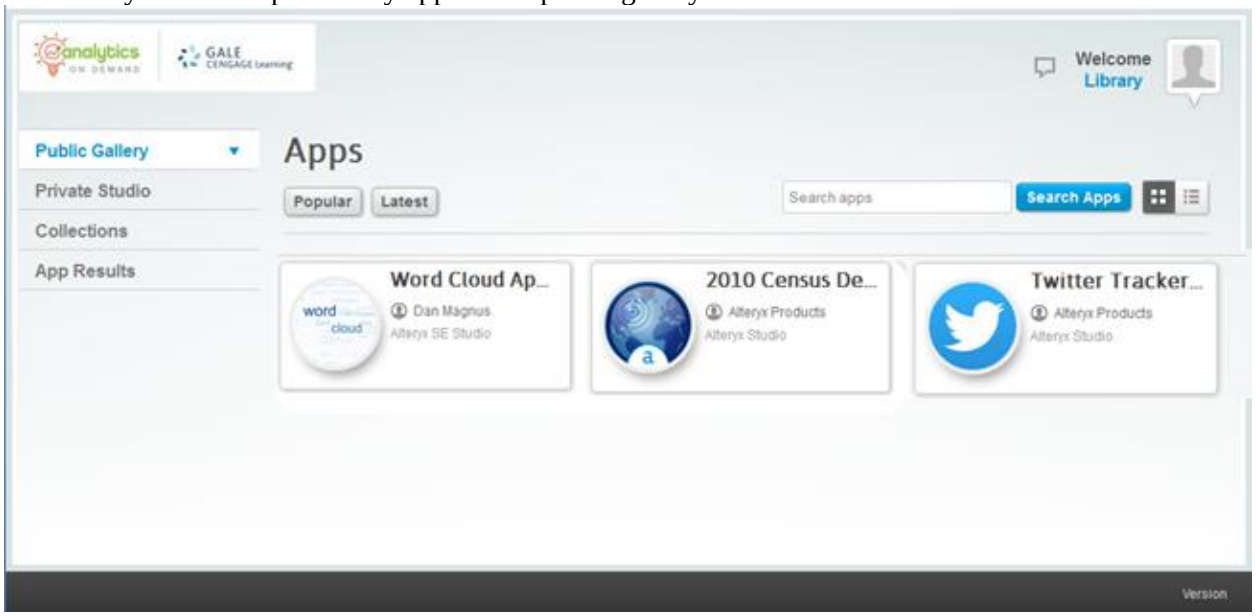
2.2 System Menu

This section describes in general terms the system menu AOD users first encounter, as well as the navigation paths to functions referenced on the screen.

2.2.1 Public Gallery

When you log into AOD, the following screen, which lists the complimentary apps included with your subscription, appears. Depending upon the number of complimentary apps in the public gallery, you may wish to click Popular to view the most popular apps or Latest to see the most recent complimentary apps that have been loaded.

Note: Staff members who created user IDs not authorized during the initial authentication setup can view and run any of the complimentary apps in the public gallery.

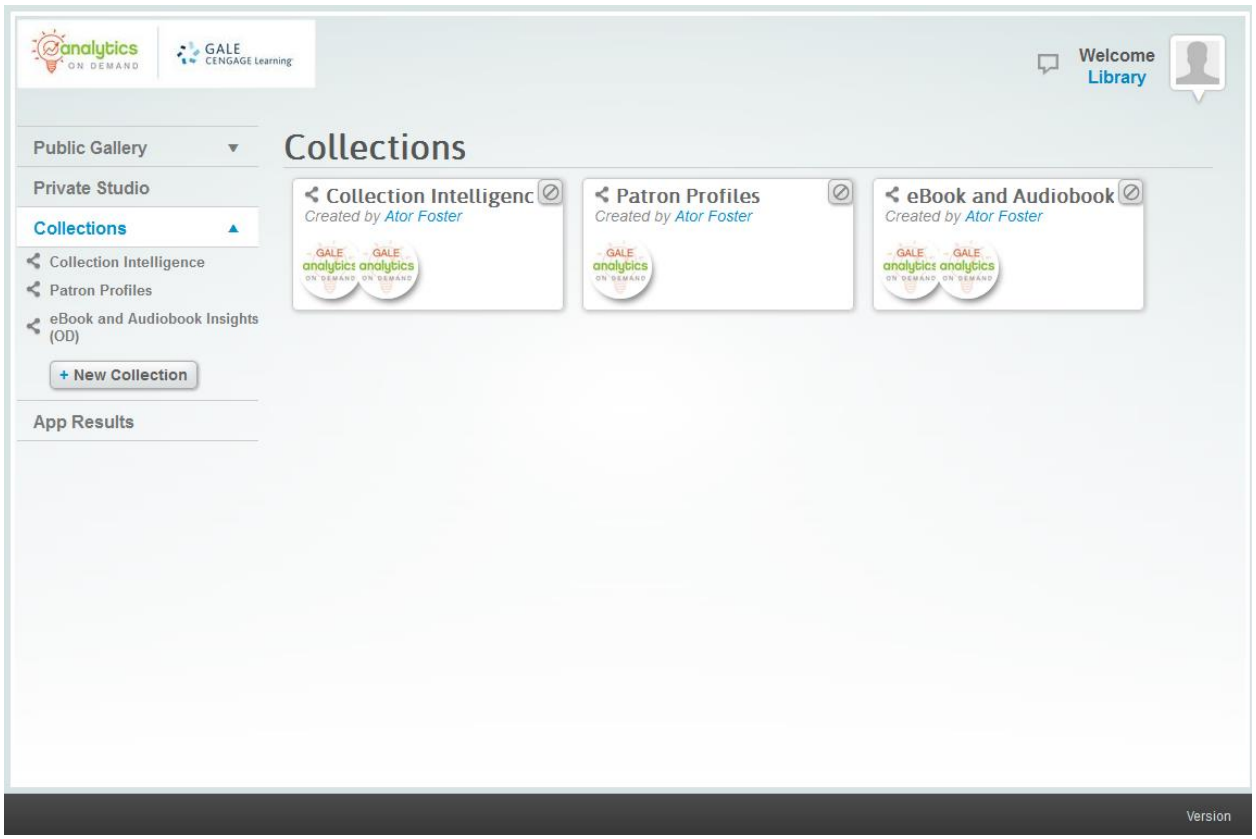


2.2.2 Private Studio & Collections

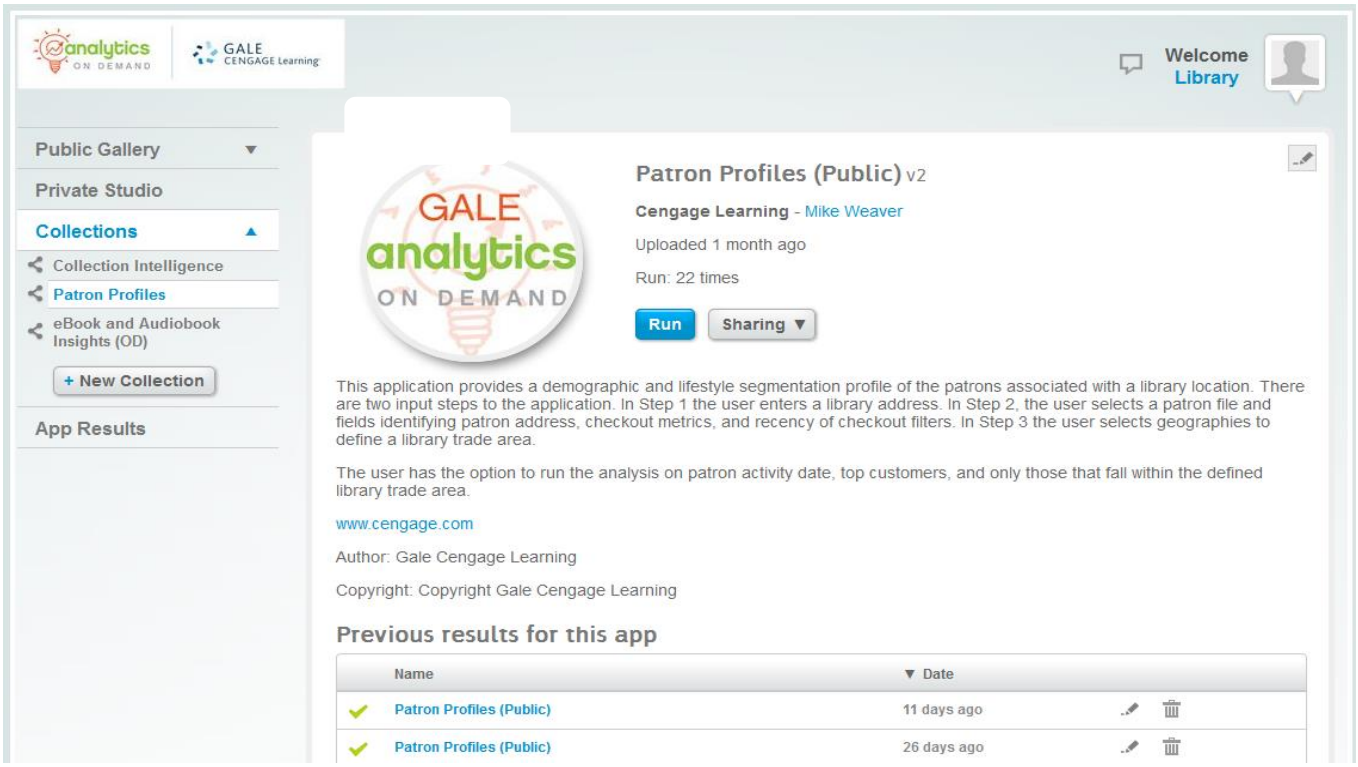
The AOD system menu appears on the left side of the screen. As noted in Section 2.2.1, logging into AOD places you in the Public Gallery.

When you click *Collections*, you can view the apps your library currently subscribes to. To access an app, click the collection name (app) or icon under the *Collections* header in the center of the screen. The app will open on its general description page. See the following screenshot for a view of the *Collections* formatting in AOD.

Note: There are several other AOD sections , and two contain apps. The first, *Private Studio*, is not open to libraries. The second, *Collections*, contains the apps your library subscribes to.



As indicated earlier, clicking a specific app opens it on its general description page, which is shown in the following screenshot.

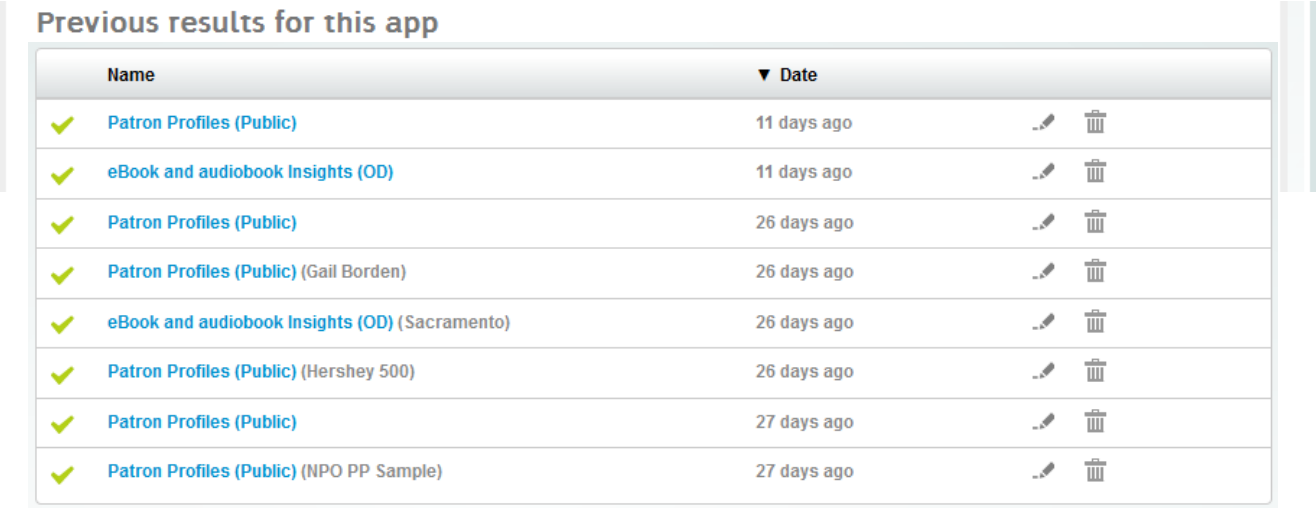

analytics ON DEMAND
GALE CENGAGE Learning
Welcome
Library
Public Gallery
Private Studio
Collections
Collection Intelligence
Patron Profiles
eBook and Audiobook Insights (OD)
+ New Collection
App Results
GALE analytics ON DEMAND
Patron Profiles (Public) v2
Cengage Learning - Mike Weaver
Uploaded 1 month ago
Run: 22 times
Run
Sharing
This application provides a demographic and lifestyle segmentation profile of the patrons associated with a library location. There are two input steps to the application. In Step 1 the user enters a library address. In Step 2, the user selects a patron file and fields identifying patron address, checkout metrics, and recency of checkout filters. In Step 3 the user selects geographies to define a library trade area.
The user has the option to run the analysis on patron activity date, top customers, and only those that fall within the defined library trade area.
www.cengage.com
Author: Gale Cengage Learning
Copyright: Copyright Gale Cengage Learning
Previous results for this app
Name
Date
Patron Profiles (Public)
11 days ago
Patron Profiles (Public)
26 days ago

The general description page:

- Provides the name of the app
- Indicates the last time the app was updated, including its version number
- Shows how many times the app was run using your login
- Provides links to output (reports) from previous runs, assuming you have not deleted them

The first three bulleted items are self-explanatory. The fourth refers to HTML-formatted output, or reports produced by previous executions of an app and stored in the cloud. Note that these reports are stored in the cloud, but the files used to create them were deleted after the apps were run. These reports remain in the cloud until you delete them by clicking the trash can (🗑) icon.

The following screen **Previous results for this app** displays a typical report and when it was run.


Previous results for this app
Name
▼ Date
Patron Profiles (Public) 11 days ago
eBook and audiobook Insights (OD) 11 days ago
Patron Profiles (Public) 26 days ago
Patron Profiles (Public) (Gail Borden) 26 days ago
eBook and audiobook Insights (OD) (Sacramento) 26 days ago
Patron Profiles (Public) (Hershey 500) 26 days ago
Patron Profiles (Public) 27 days ago
Patron Profiles (Public) (NPO PP Sample) 27 days ago

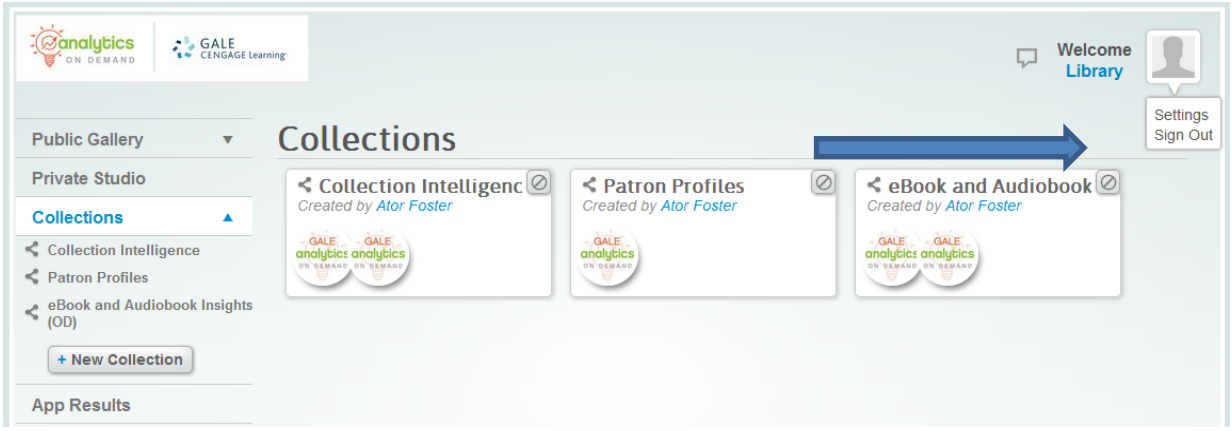
The screen **Previous results for this app** displays a running list of all the reports you have run and not deleted. As in the individual app list, you may rename or delete these reports by clicking the appropriate icon.

Note: You may delete any or all of these reports. You may also click the **renaming icon** ( ) to rename them. This provides a second opportunity to uniquely name a report. Your first opportunity was when the app was initially run.

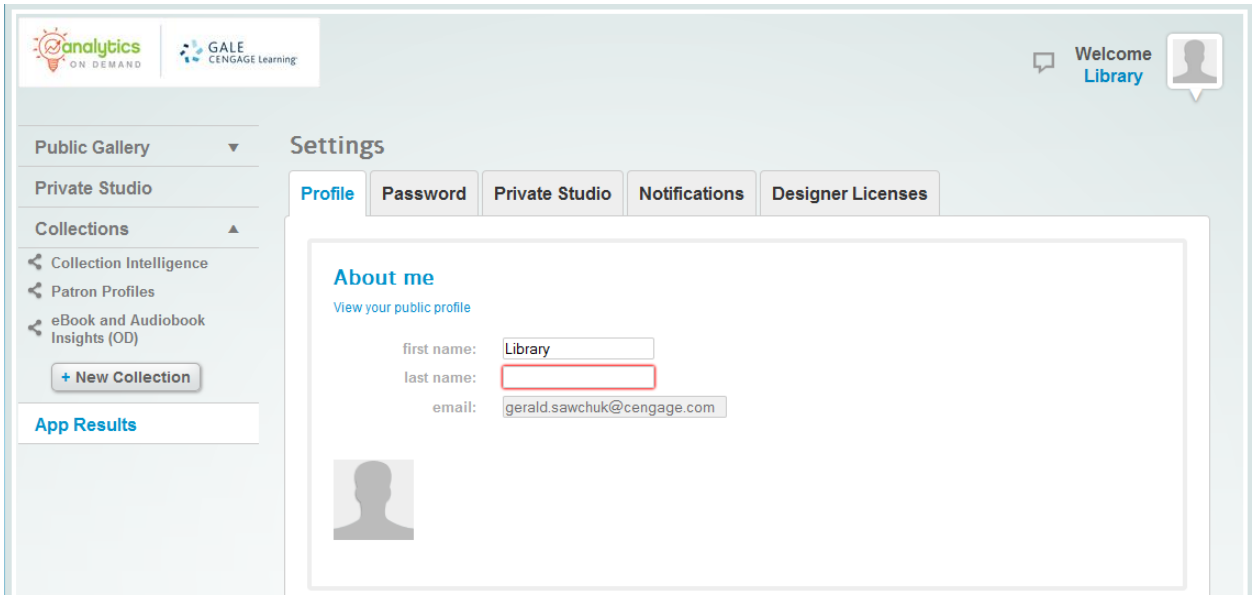
2.3 Changing Selected User ID Information and Password

This section describes how to change selected information related to your user ID, including your password.

To access and change this information, click **Settings** by moving your cursor in the top right corner of the screen.

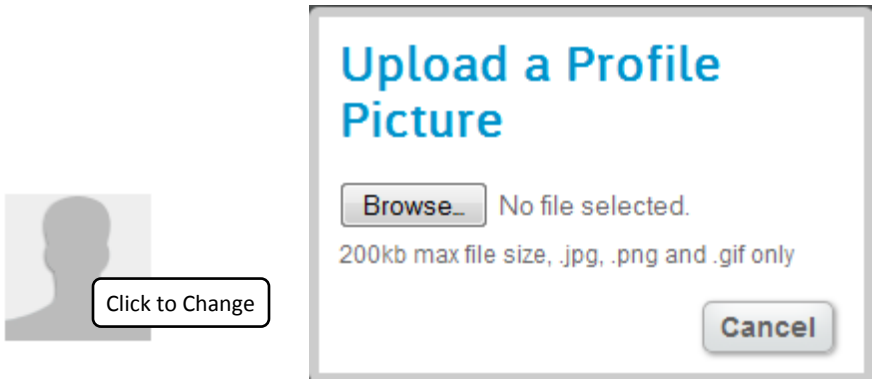


The following screen displays see multiple tabs. Only **Profile** and **Password** are accessible to you. Click **Profile** to change general information that appears on screen views when you are logged in. This includes the ability to upload an image that is visible in the upper right corner at login.



You can change this image by mousing over it.

A box that instructs you to **Click to Change** appears. After you click it, a box that instructs you to browse your hard drive for a new image—similar to attaching a file to an email—appears.



Save any changes you make by clicking the

icon. All changes will appear the next time you log into AOD.

2.3 AOD Data Sources

This section covers current AOD data sources that you may blend with your library's data, depending on the specific AOD app used.

2.3.1 Demographics Segmentation Syndicated Survey Data

Experian Estimates & Projections (CAPE)
- Demographic data, consumer expenditure, retail demand, daytime population

Experian Mosaic
- Residential clustering definition and classifications

The Experian data install includes the following datasets and, with Mosaic and Mosaic Workplace, is referred to as CAPE:

- Current YR and 5YR Demographic Estimates and Projections
- US Census (2010)
- Current YR and 5YR Consumer Expenditure and Retail Demand
- 2012 American Community Survey (ACS)
- 2013 Mosaic and Mosaic Workplace (BG Dominant and Distributions)
- 2013 Simmons Syndicated Survey

2.3.2 Demographics Household Data

Experian ConsumerView [SM]
- Household demographic data

Experian's data warehouse of consumer demographics and self-reported life event, direct response, property, and mortgage information is the largest and most comprehensive resource for both list services and data enhancement available today — including data on more than 235 million consumers and 113 million households in the U.S.

Released quarterly, household fields include Mosaic Household and ZIP4, mail order buyer preferences, mortgage/home purchase, median family income, estimated income, dwelling type, and presence of children under 18. At the individual level, it includes marital status, gender, education, and occupation group.

2.3.3 Spatial Data

TomTom
- Address Points, Streetware, Geocoder, ZIP+4 Coder, CASS and Drivetime engine

Alteryx
- Maps

These products provide a visual display or add spatial dimension to files through address cleansing, geocoding, and drive time creation.

- Address Points includes more than 80 million parcel centroids. A parcel is the property boundary of an address; most of the points in the database are the centroid of the property boundary. However some of the points are edited by TomTom to rooftop accuracy and can enhance geocoding results.
- Alteryx Maps enhances mapping with atlas-like reference layers.
- Geocoder adds a spatial object (latitude/longitude) to addresses for visualization and data retrieval processes.
- ZIP+4 Coder adds spatial objects at multiple levels: ZIP Code, ZIP +2 and ZIP +4.

- CASS offers address clean-up and standardization for better data matching processes and geocoding.
- Guzzler creates drive-time polygons or measurements between points based upon distance or speed for visualization and reporting.

2.3.3 Data Update Schedule

	Q1	Q2	Q3	Q4
TomTom Geocoding Data	x	x	x	x
TomTom Mapping Data	x		x	
Drivetime Engine	x		x	
Experian CAPE Demographics	x		x	
Mosaic Segmentation	x			
Simmons Behavioral Data			x	
Experian HH File	x	x	x	x
Spatial/Data Designer Update	Week of Jun 16	Week of Sep 15	Week of Dec 15	Week of Mar 16
Gallery Update	Week of Jun 30	Week of Sep 30	Week of Dec 30	Week of Mar 30
CASS	Feb, Apr, Jun, Aug, Oct, Dec			

2.4 AOD Data Security

2.4.1 Cloud Storage/Security

- Amazon Web Services (AWS) is the cloud computing service [Platform as a Service (PaaS)] for the AOD/Alteryx Analytics Gallery.
- AWS has a number of certification and accreditations with respect to the security of its hardware and supporting services. (See http://aws.amazon.com/security/.)
- AOD stores the output data file in a compressed, proprietary schema in a NoSQL data warehouse, until the user deletes the output file.
- Even if an attacker could obtain a copy or portion of the output report stored in the data warehouse, they would lack the proprietary code to decrypt and use the data. In addition, the output report lacks detailed information on any specific library patron.

2.4.2 Data Transfer

- When an AOD application is run, the file created is not permanently stored but rather used during run time and deleted immediately afterward. The communication "channel" used to deliver a file to an application is an encrypted channel.
- The only output from running an application is a report that is saved until a user deletes it.

- All files and report outputs can only be viewed by a user who has logged into AOD to execute an application.

2.4.3 Analytics Gallery

- While any data is stored in a shared NoSQL data warehouse, security firewalls and multiple permission levels prevent access to the AOD applications or their data to anyone other than a specific library user who has been authorized to use them.
- Neither Gale nor Alteryx gallery administrators have access to content/data used to generate a report by a specific customer. Permission must be explicitly granted to a Gale/Alteryx administrator or delivered to a Gale/Alteryx representative via some other electronic means such as FTP or email.
- The AOD site was reviewed and security penetration tests were performed by a third-party vendor.

2.4.4 Execution/Runtime

- AOD applications and associated data are secure even when being transferred among the horizontal array of execution servers in AWS.
- All communication is compressed and encrypted among all servers in the array to prevent "man-in-the-middle" attacks.
- Execution is a transient operation and no residual data (temporary or otherwise) is persisted in any location other than the secure data warehouse.

3.0 PATRON PROFILES (PUBLIC)

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This section provides a detailed description of the Patron Profiles app.

3.1 Patron Profiles (Public)

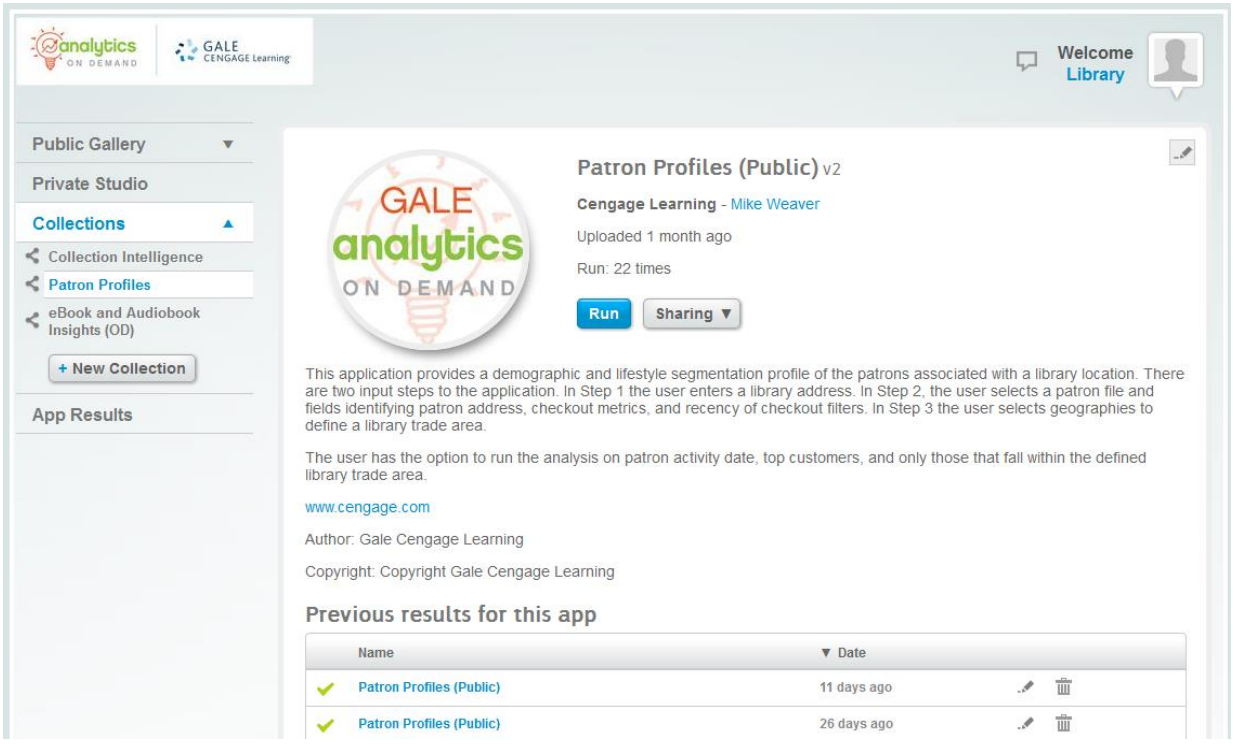
This app explains who a public library's patrons are—and aren't—so that a library can make data-driven decisions and drive meaningful outcomes for itself and the community it serves.

Patron Profile reports include:

- **Methodology** – Uses Mosaic lifestyle customer/market segmentation on a household basis with more than 71 types and 19 groupings.
- **Demographic Overview** – Includes an analysis of the library community's demographic data from the 2010 Census, a current view, and a 5-year forecast of key variables.
- **Patron Analysis Demographics –** Shows library activity based on location, household composition, dwelling type, and other variables.

3.1.1 Patron Profiles – Initial Screen

The following screen appears when you click the *Patron Profiles (Public)* app:


analytics ON DEMAND
GALE CENGAGE Learning
Welcome
Library
Public Gallery
Private Studio
Collections
Collection Intelligence
Patron Profiles
eBook and Audiobook Insights (OD)
+ New Collection
App Results
GALE analytics ON DEMAND
Patron Profiles (Public) v2
Cengage Learning - Mike Weaver
Uploaded 1 month ago
Run: 22 times
Run
Sharing
This application provides a demographic and lifestyle segmentation profile of the patrons associated with a library location. There are two input steps to the application. In Step 1 the user enters a library address. In Step 2, the user selects a patron file and fields identifying patron address, checkout metrics, and recency of checkout filters. In Step 3 the user selects geographies to define a library trade area.
The user has the option to run the analysis on patron activity date, top customers, and only those that fall within the defined library trade area.
www.cengage.com
Author: Gale Cengage Learning
Copyright: Copyright Gale Cengage Learning
Previous results for this app
Name
Date
Patron Profiles (Public)
11 days ago
Patron Profiles (Public)
26 days ago

This screen provides key information:

- **Version number** – When the app is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.

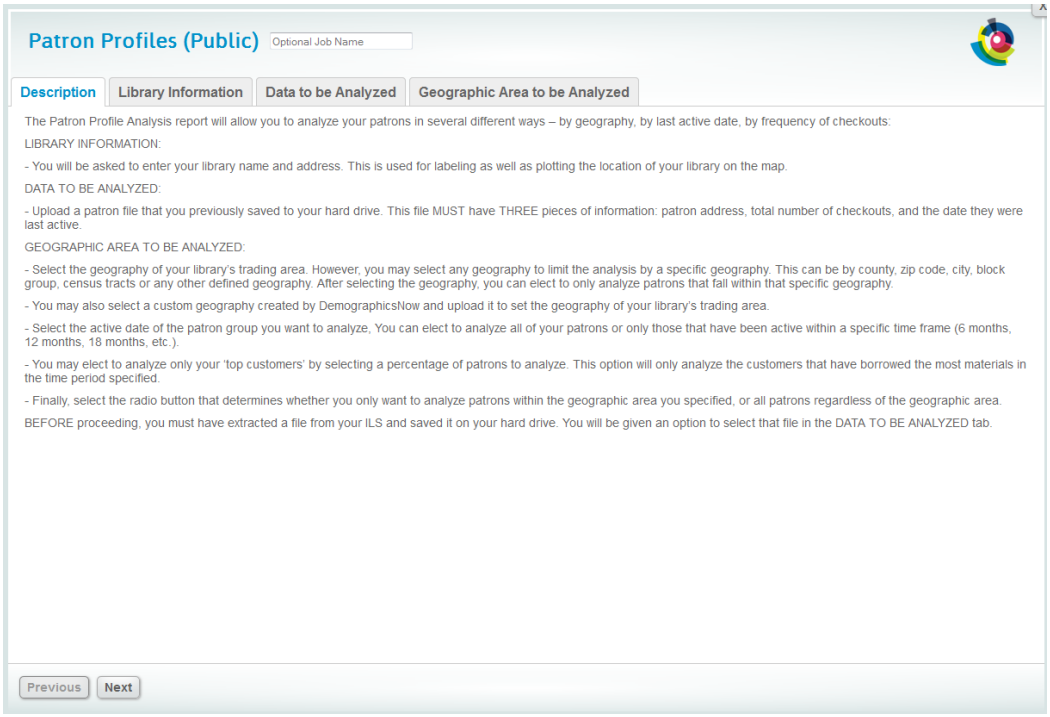
- **A summary description of the app** – "This application provides a demographic and lifestyle segmentation profile of the patrons associated with a library location. There are two input steps to the application. In Step 1 the user enters a library address. In Step 2, the user selects a patron file and fields identifying patron address, checkout metrics, and recency of checkout filters. In Step 3 the user selects geographies to define a library trade area."

  "The user has the option to run the analysis on patron activity date, top customers, and only those that fall within the defined library trade area."

- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

3.1.2 Patron Profiles – Description

When you click Run, the following screen appears. Note that the screen displays four tabs. (Some apps may have more or fewer tabs.) The **Description** tab explains what is required to run the app, including a high-level overview of commands.


Patron Profiles (Public)
Optional Job Name
Description
Library Information
Data to be Analyzed
Geographic Area to be Analyzed
The Patron Profile Analysis report will allow you to analyze your patrons in several different ways – by geography, by last active date, by frequency of checkouts:
LIBRARY INFORMATION:
- You will be asked to enter your library name and address. This is used for labeling as well as plotting the location of your library on the map.
DATA TO BE ANALYZED:
- Upload a patron file that you previously saved to your hard drive. This file MUST have THREE pieces of information: patron address, total number of checkouts, and the date they were last active.
GEOGRAPHIC AREA TO BE ANALYZED:
- Select the geography of your library's trading area. However, you may select any geography to limit the analysis by a specific geography. This can be by county, zip code, city, block group, census tracts or any other defined geography. After selecting the geography, you can elect to only analyze patrons that fall within that specific geography.
- You may also select a custom geography created by DemographicsNow and upload it to set the geography of your library's trading area.
- Select the active date of the patron group you want to analyze, You can elect to analyze all of your patrons or only those that have been active within a specific time frame (6 months, 12 months, 18 months, etc.).
- You may elect to analyze only your 'top customers' by selecting a percentage of patrons to analyze. This option will only analyze the customers that have borrowed the most materials in the time period specified.
- Finally, select the radio button that determines whether you only want to analyze patrons within the geographic area you specified, or all patrons regardless of the geographic area.
BEFORE proceeding, you must have extracted a file from your ILS and saved it on your hard drive. You will be given an option to select that file in the DATA TO BE ANALYZED tab.
Previous
Next

This tab allows you to name an output report in the text box located at the upper left side of the screen:

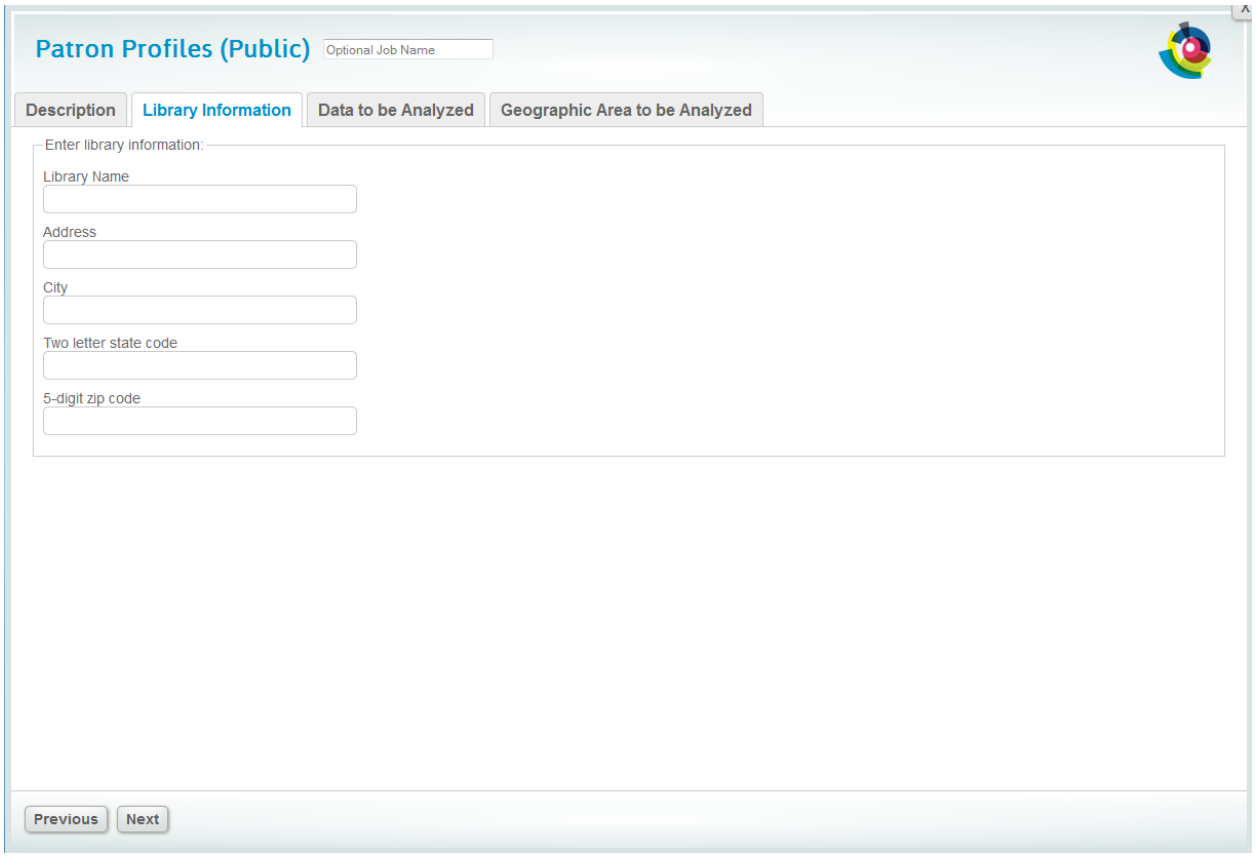
By using unique names, you can easily identify reports from previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, you may click the Next button on the lower left side of the screen or the tab at the top of the screen.

3.1.3 Patron Profiles – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for three purposes:

- To label the report generated
- To identify the spatial GIS point of the library's location in order to map this on map views in the report
- To calculate the drive time for each library patron from home to the library



Click Next at the lower left side of the screen to proceed to the next tab.

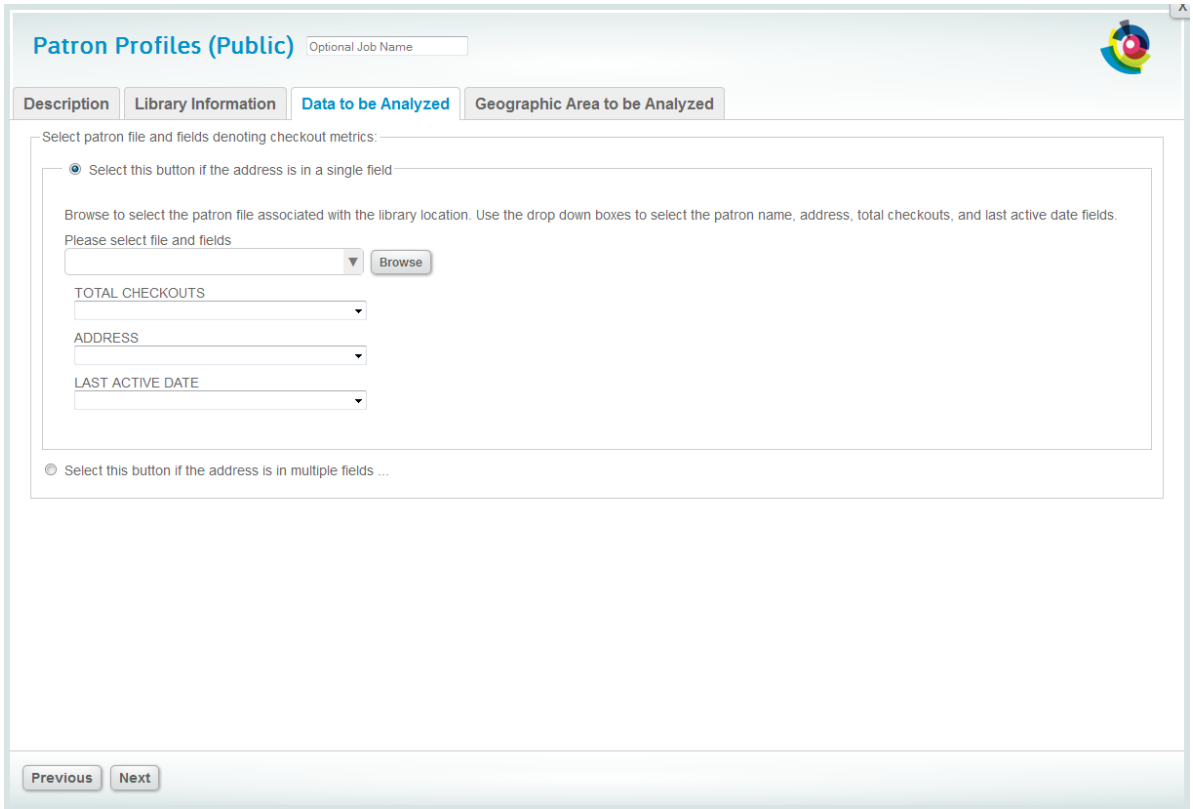
3.1.4 Patron Profiles – Data to be Analyzed

Use the **Data to be Analyzed** tab to upload a data file—normally an Excel—file from your ILS. This file requires three specific pieces of information: patron address, total checkouts, and a patron's last active date.

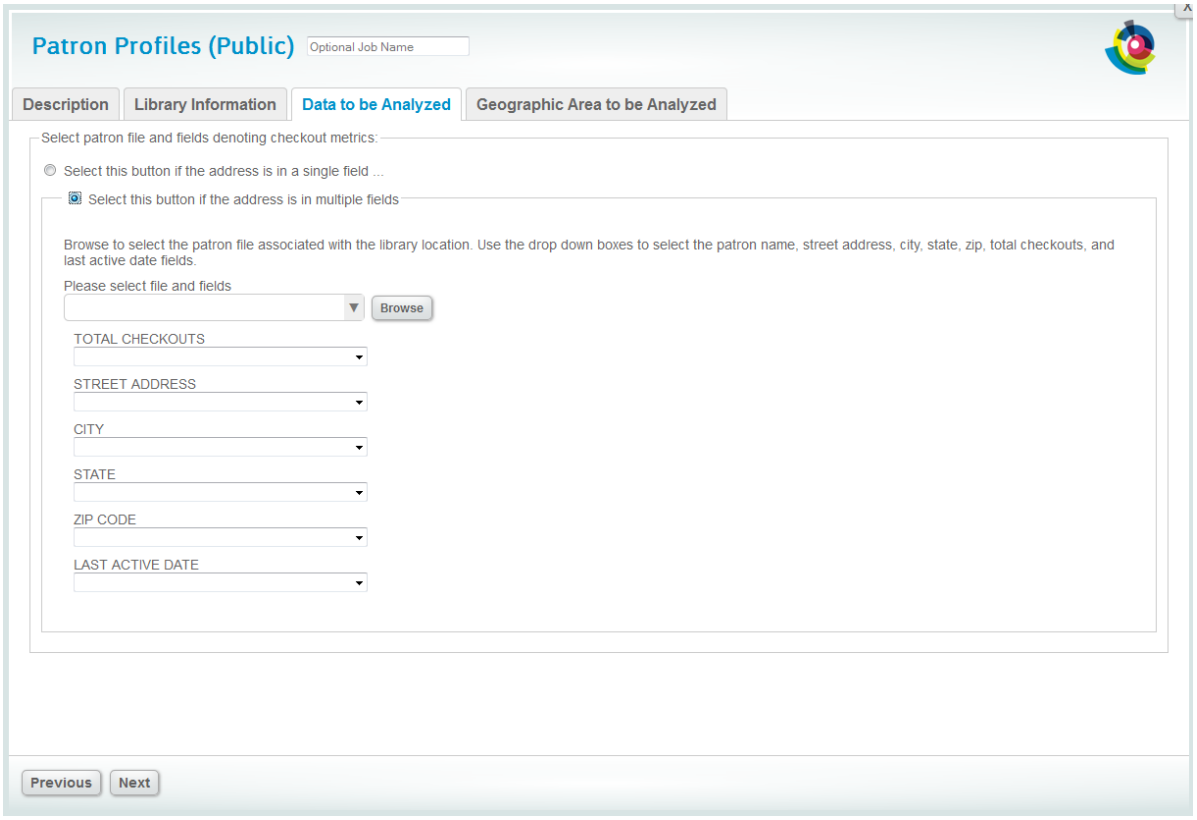
You have flexibility in the type of data to include. For example, for total checkouts, your file could include total checkouts over the life of the library card or some subset filtered by ILS extraction. Perhaps the ILS extract includes only six months or a year of checkouts. For last active date—if the ILS allows it—you may want to include only the last activity date for physical checkouts, the last activity date for computer use, or any other date tracked in in the ILS. This allows filtering not only by the *Patron Profiles* app (more on this to follow) but also on the ILS extract date you used to create the AOD input file.

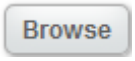
The following screenshots show data for an input file that includes a patron address. Depending on your ILS, a patron address may be extracted and placed in multiple columns—one or two for street address, one for city, one for state, and one for ZIP code. The view presented depends on the radio button you select. (The single-column address view is the default.)

This screen shows the single-column address view.


Patron Profiles (Public)
Optional Job Name
Description
Library Information
Data to be Analyzed
Geographic Area to be Analyzed
Select patron file and fields denoting checkout metrics:
Select this button if the address is in a single field
Browse to select the patron file associated with the library location. Use the drop down boxes to select the patron name, address, total checkouts, and last active date fields.
Please select file and fields
Browse
TOTAL CHECKOUTS
ADDRESS
LAST ACTIVE DATE
Select this button if the address is in multiple fields ...
Previous
Next

The following screen shows the multiple-column address view.


Patron Profiles (Public)
Optional Job Name
Description
Library Information
Data to be Analyzed
Geographic Area to be Analyzed
Select patron file and fields denoting checkout metrics:
Select this button if the address is in a single field ...
Select this button if the address is in multiple fields
Browse to select the patron file associated with the library location. Use the drop down boxes to select the patron name, street address, city, state, zip, total checkouts, and last active date fields.
Please select file and fields
Browse
TOTAL CHECKOUTS
STREET ADDRESS
CITY
STATE
ZIP CODE
LAST ACTIVE DATE
Previous
Next

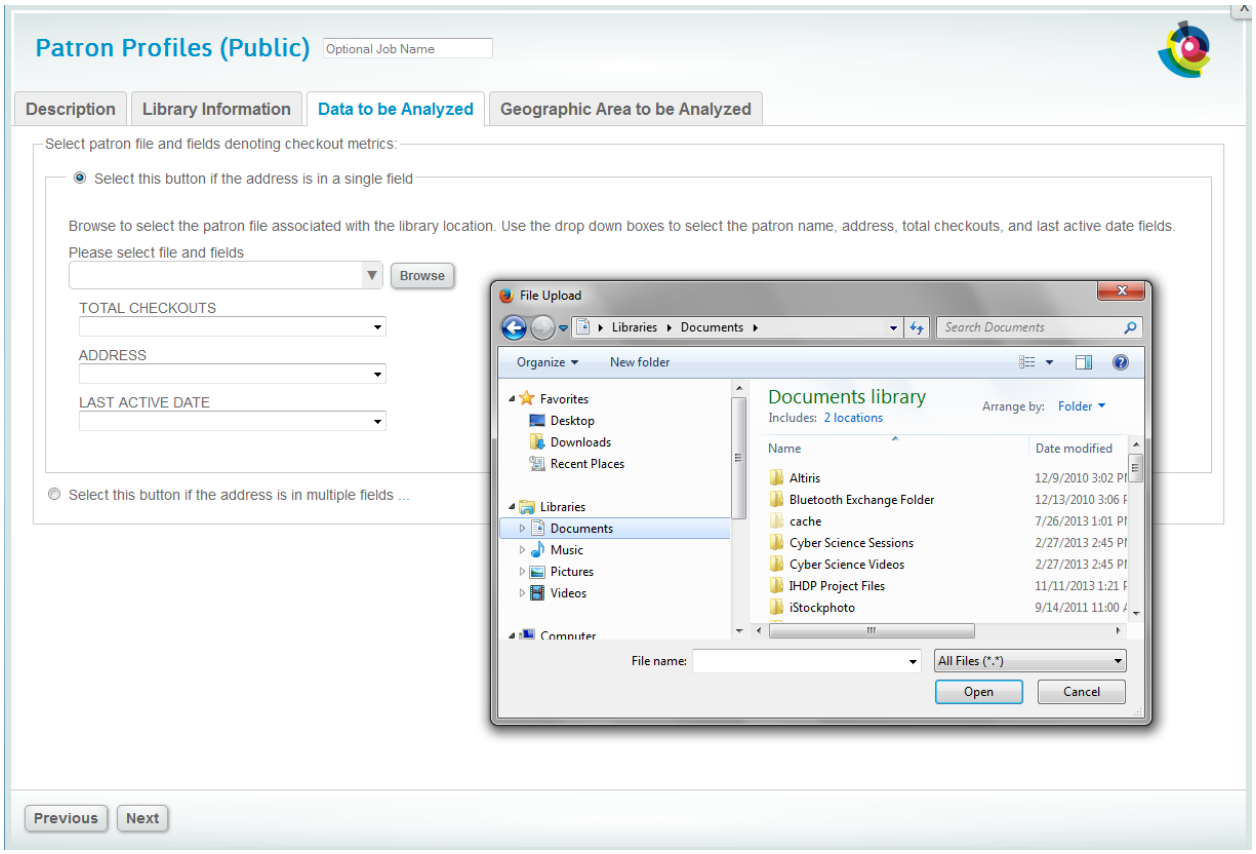
Once you select the address radio button, the next step is to click the 

button to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You **must** have already extracted your input file from your ILS before accessing the app.

It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the app from running properly. If any problems occur during running the app, contact Gale Customer Care.

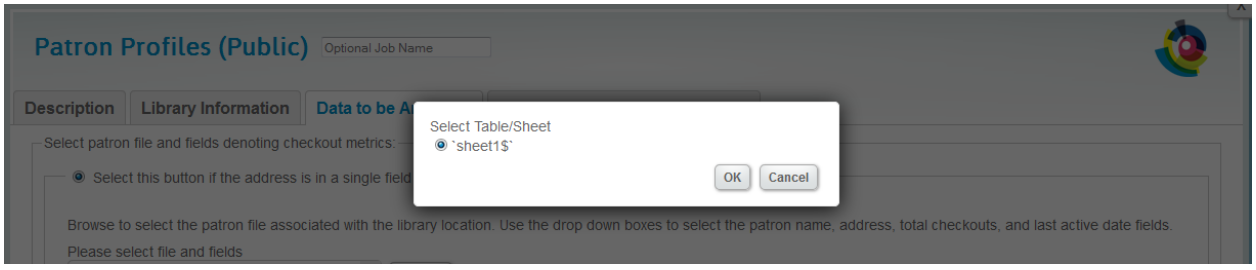
As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is correct by clicking

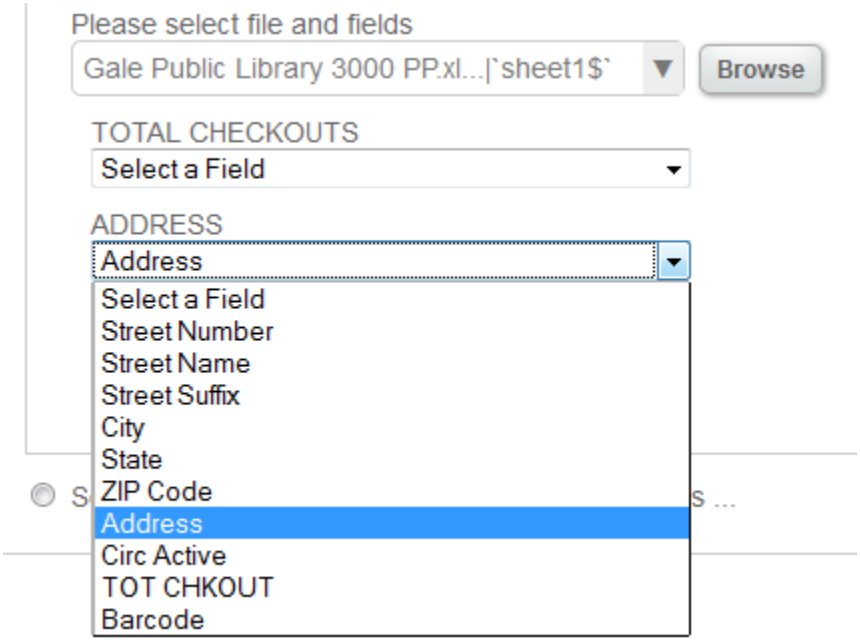
.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.


Patron Profiles (Public)
Optional Job Name
Description
Library Information
Select patron file and fields denoting checkout metrics:
Select this button if the address is in a single field
Select Table/Sheet
`sheet1$`
OK
Cancel
Browse to select the patron file associated with the library location. Use the drop down boxes to select the patron name, address, total checkouts, and last active date fields.
Please select file and fields

Once you have confirmed the selection, AOD loads the file into the app and attempts to match the columnar fields to the names on each of the fields identified in this tab (address, checkouts, and active date). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the app has selected the correct columns of data. If not, click the drop-down list **Please select file and fields** to deselect the choice made and replace it with the correct choice.

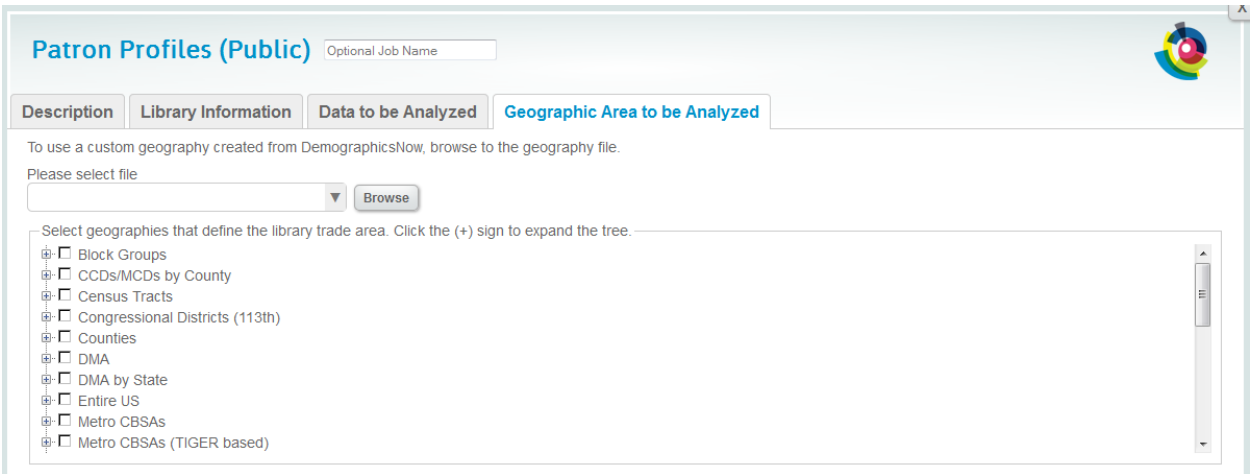
On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.



Click Next at the lower left side of the screen to proceed to the next tab.

3.1.5 Patron Profiles – Geographic Area to be Analyzed

Your next step is to identify the geographic area you want to analyze. Examples of geographies include a) the library's service area, b) surrounding geographies outside the service area (to analyze patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).

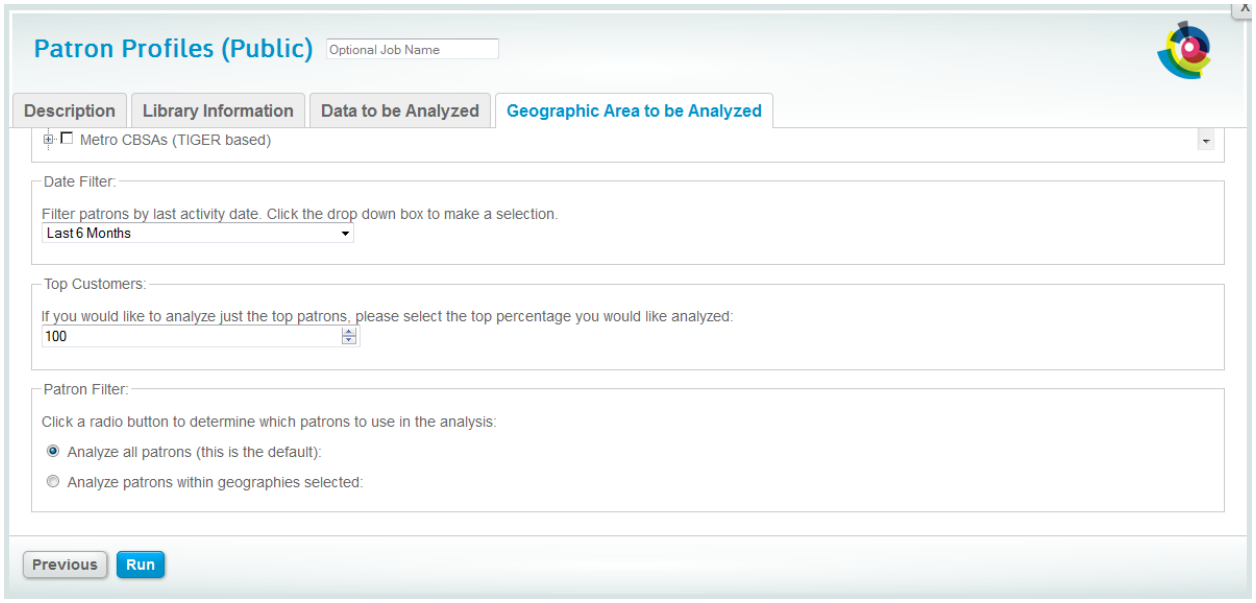


You can select geographies from the geography tree menu or upload a custom geography (GIS) file by first creating a custom geography in the Gale product, *DemographicsNow for Libraries*. If you are loading a previously saved custom geography from *DemographicsNow for Libraries*, click the Browse button at the top of the screen and locate the **.yxdb file**—the format of the saved *DemographicsNow for Libraries* custom geography file—in the directory and select it. When the file appears in the file window, bypass the geography tree and move to the next filtering question, which appears after the geography tree.

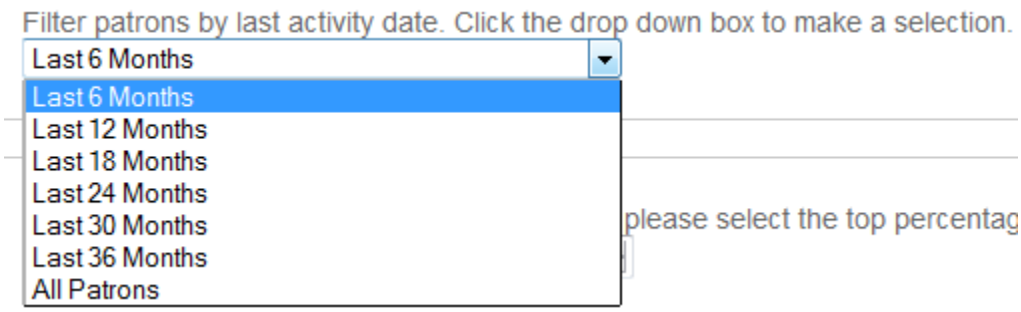
If you decide to a geography from the geography tree, first locate the type of geography to be loaded, such as ZIP code, county, block group, census tract, or CBSA. Next, click the **+ sign** to expand the list and locate the geography you want. You may select a single geography by clicking the box next to it. (A check mark appears.) You may select multiple geographies by checking the box next to each one. If you select multiple geographies, they will be combined in the analysis.

Note: If you are interested in a county, do not select all its block groups. The AOD system calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculations may take hours.

After you select a geography, scroll down the screen and choose the three final filters: a) patron activity date, b) percentage of top patrons, and c) whether to include or exclude patrons outside the geography selected.


Patron Profiles (Public)
Optional Job Name
Description
Library Information
Data to be Analyzed
Geographic Area to be Analyzed
Metro CBSAs (TIGER based)
Date Filter:
Filter patrons by last activity date. Click the drop down box to make a selection.
Last 6 Months
Top Customers:
If you would like to analyze just the top patrons, please select the top percentage you would like analyzed:
100
Patron Filter:
Click a radio button to determine which patrons to use in the analysis:
Analyze all patrons (this is the default):
Analyze patrons within geographies selected:
Previous
Run

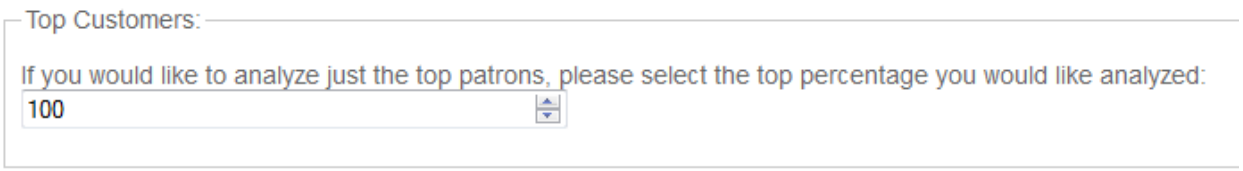
As noted, the first filter is **patron activity date**. Click the arrow for a drop-down menu of choices. The default is the last 6 months.


Filter patrons by last activity date. Click the drop down box to make a selection.
Last 6 Months
Last 6 Months
Last 12 Months
Last 18 Months
Last 24 Months
Last 30 Months
Last 36 Months
All Patrons
please select the top percentag

This means that only those patrons who had activity on their library card in the last six months are included in the **Patron Analysis**. To change this selection, select the option you prefer. Note that this filter is keyed to the date field in the **Data to be Analyzed** tab.

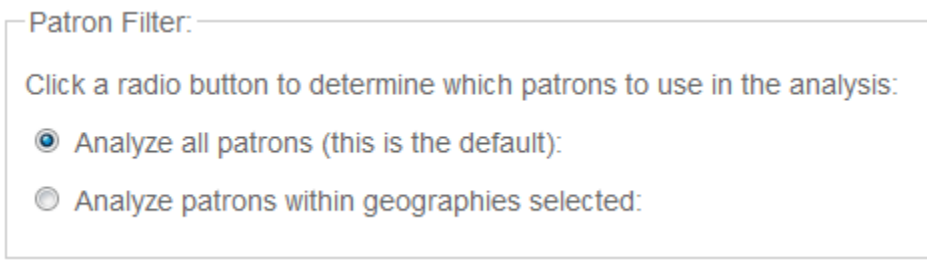
Note: You can define the extract activity date column differently. That is, you can choose a date from cardholder inception or a period of time defined by the ILS extraction when creating the input file. The most common choice is the last date of patron activity, with no filter applied when extracting the file from the ILS.

The next filter, **Top Customers**, allows you to select a percentage of your heaviest users, as measured by **Total Checkouts** column data in the user input file.

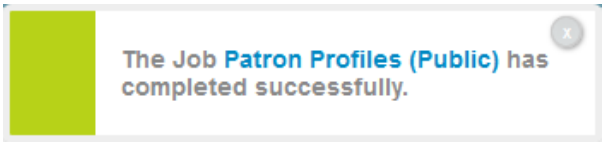

Top Customers:
If you would like to analyze just the top patrons, please select the top percentage you would like analyzed:
100

By clicking the arrows to the right of the box, you can choose to analyze a percentage of your very best "customers." This could be the top five (5) percent of users, as measured by a highest-to-lowest ranking of checkouts. This selection is best used after first analyzing all patrons and then doing selective analysis on smaller groups of patrons. You may, for example, want to do a percentage ranking of usage by patrons from a smaller geography or by patrons who live outside the service area.

Finally, the **patron filter** looks at whether patrons live inside or outside the library service area. The default includes all patrons, regardless of where they live. Clicking **Analyze patrons within geographies selected** includes patrons only if their addresses lie within the service area geography you defined earlier.


Patron Filter:
Click a radio button to determine which patrons to use in the analysis:
Analyze all patrons (this is the default):
Analyze patrons within geographies selected:

Setting the patron filter is the final step in creating patron profiles. Click Run at the lower left side of the screen to begin the analysis. When the analysis is finished, the following message appears on the screen if you are still logged on:



Please note that it is not necessary to wait until the analysis completes. By clicking

onat the upper right side of the screen, you can return to the original app screen and the analysis will run in the background.

You can also log out or execute another AOD app analysis. If you want to make minor modifications and re-run the analysis with a different filter, select the Re-Run button at the lower left side of the screen. All your information is saved and you can modify any earlier choices to re-run the analyis.

4.0 COLLECTION INTELLIGENCE

4.0 COLLECTION INTELLIGENCE (PUBLIC)

This section provides a detailed description of the *Collection Intelligence* apps. Two apps comprise this bundle: Collection Intelligence (Public) and Collection Intelligence (Public) Maps.

4.1 Collection Intelligence (Public)

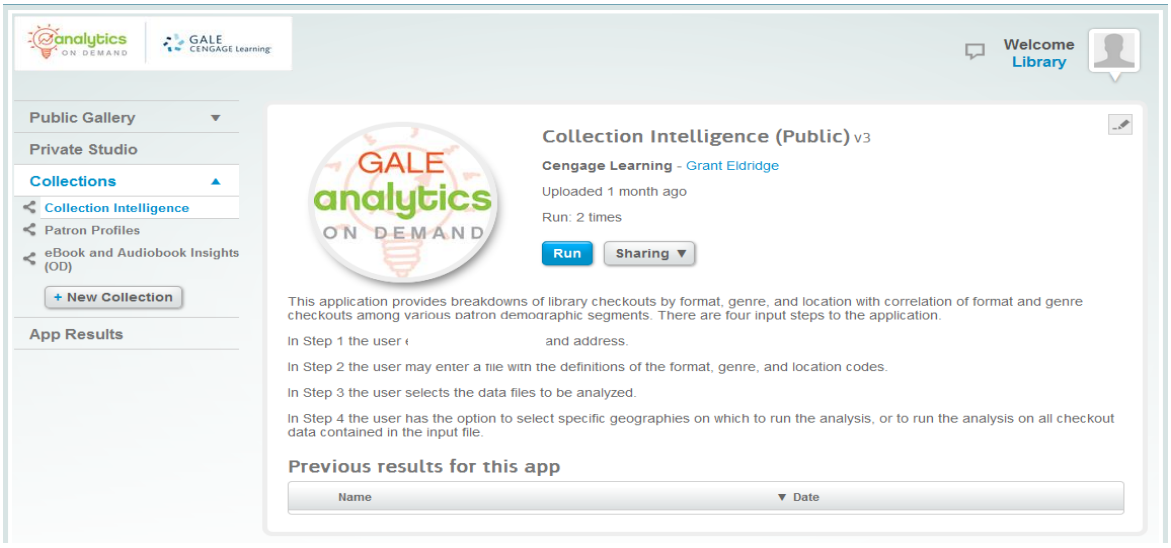
This section provides a detailed description of the *Collection Intelligence* app. This app explains what a public library's patrons are—and aren't—borrowing, so your library can make data-driven decisions and deliver drive meaningful outcomes for itself and the community.

The **Material and Genre Analysis** in *Collection Intelligence* can be used to craft marketing messages, develop targeted marketing lists, stock appropriate library materials, and identify target areas for promotion.

The app begins with an analysis of material types and genres (subjects) that are borrowed by all library patrons and then breaks the genres down into different Mosaic lifestyle clusters. The app then provides insight into the Mosaic lifestyle clusters and the genres borrowed by library patrons. The analysis covers only the specific geographic area you select.

4.1.1 Collection Intelligence – Initial Screen

The following screen appears when you click the *Collection Intelligence* app:


analytics ON DEMAND
GALE CENGAGE Learning
Welcome
Library
Public Gallery
Private Studio
Collections
Collection Intelligence
Patron Profiles
eBook and Audiobook Insights (OD)
+ New Collection
App Results
GALE analytics ON DEMAND
Collection Intelligence (Public) v3
Cengage Learning - Grant Eldridge
Uploaded 1 month ago
Run: 2 times
Run
Sharing
This application provides breakdowns of library checkouts by format, genre, and location with correlation of format and genre checkouts among various patron demographic segments. There are four input steps to the application.
In Step 1 the user
and address.
In Step 2 the user may enter a file with the definitions of the format, genre, and location codes.
In Step 3 the user selects the data files to be analyzed.
In Step 4 the user has the option to select specific geographies on which to run the analysis, or to run the analysis on all checkout data contained in the input file.
Previous results for this app
Name
Date

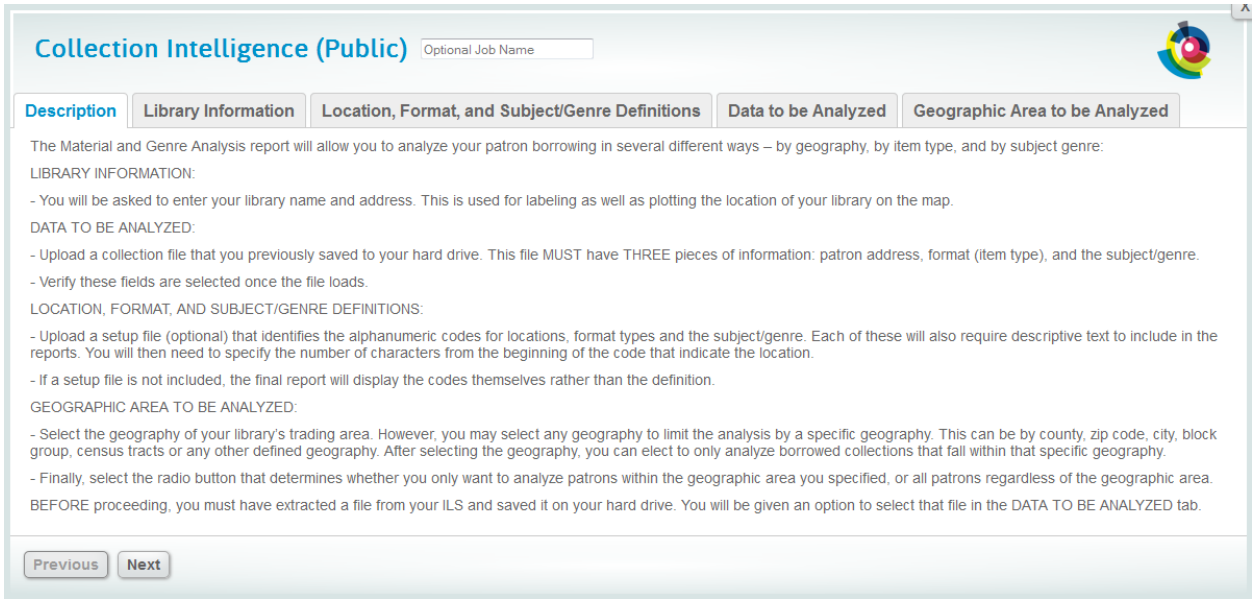
This screen provides the following key information:

- **Version number** – When the app is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.

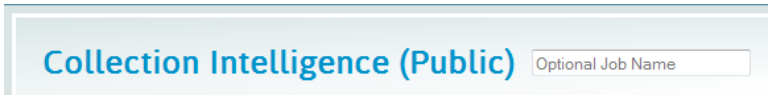
- **A summary description of the app** – "This application provides breakdowns of library checkouts by format, genre, and location with correlation of format and genre checkouts among various patron demographic segments. There are four input steps to the appoication. In Step 1 the user enteres a library name and address. In Step 2 th user may enter a file with the definitions of the format, genre, and location codes. In Step 3 the user selects the data files to be analyzed. In Step 4 the user has the option to select specific geographies on which to run the analysi, or to run the analysis for all checkout data contained in the input file."
- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

4.1.2 Collection Intelligence – Description

When you click Run, the following screen appears. Note that the screen displays five tabs. (Some apps may have more or fewer tabs.) The **Description** tab explains what is required to run the app, including a high-level overview of the commands


Collection Intelligence (Public)
Optional Job Name
Description
Library Information
Location, Format, and Subject/Genre Definitions
Data to be Analyzed
Geographic Area to be Analyzed
The Material and Genre Analysis report will allow you to analyze your patron borrowing in several different ways – by geography, by item type, and by subject genre:
LIBRARY INFORMATION:
- You will be asked to enter your library name and address. This is used for labeling as well as plotting the location of your library on the map.
DATA TO BE ANALYZED:
- Upload a collection file that you previously saved to your hard drive. This file MUST have THREE pieces of information: patron address, format (item type), and the subject/genre.
- Verify these fields are selected once the file loads.
LOCATION, FORMAT, AND SUBJECT/GENRE DEFINITIONS:
- Upload a setup file (optional) that identifies the alphanumeric codes for locations, format types and the subject/genre. Each of these will also require descriptive text to include in the reports. You will then need to specify the number of characters from the beginning of the code that indicate the location.
- If a setup file is not included, the final report will display the codes themselves rather than the definition.
GEOGRAPHIC AREA TO BE ANALYZED:
- Select the geography of your library's trading area. However, you may select any geography to limit the analysis by a specific geography. This can be by county, zip code, city, block group, census tracts or any other defined geography. After selecting the geography, you can elect to only analyze borrowed collections that fall within that specific geography.
- Finally, select the radio button that determines whether you only want to analyze patrons within the geographic area you specified, or all patrons regardless of the geographic area.
BEFORE proceeding, you must have extracted a file from your ILS and saved it on your hard drive. You will be given an option to select that file in the DATA TO BE ANALYZED tab.
Previous
Next

This tab allows you to name an output report in the text box located in the top left portion of the screen:



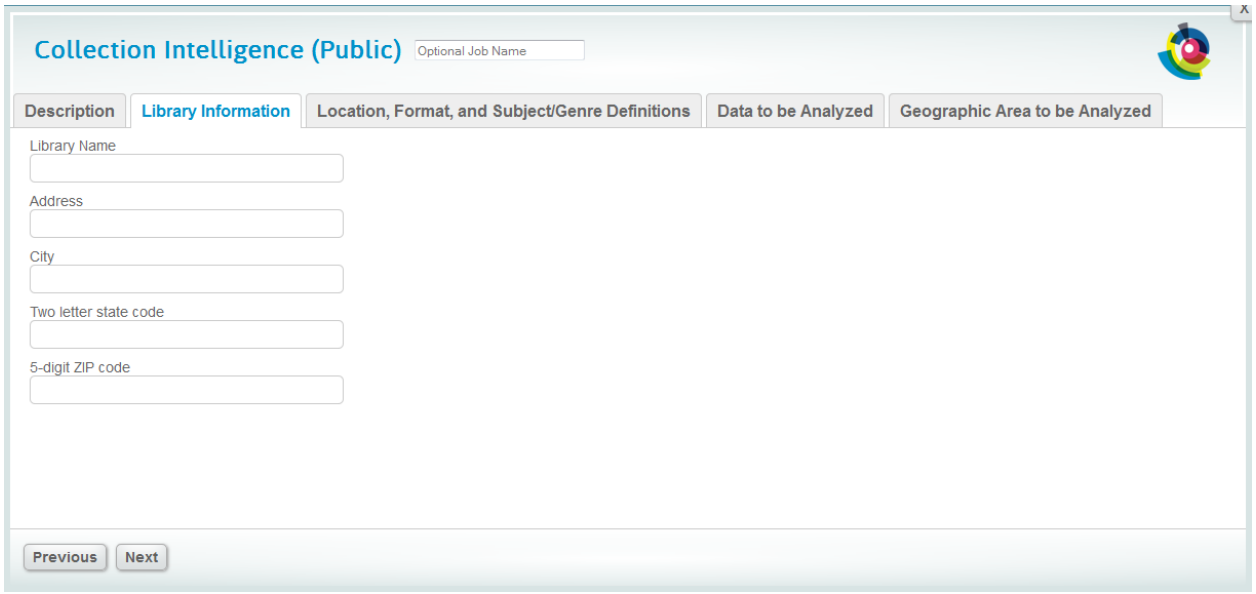
By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, click the Next button on the lower left side of the screen or the tab at the top of the screen.

4.1.3 Collection Intelligence – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for three purposes:

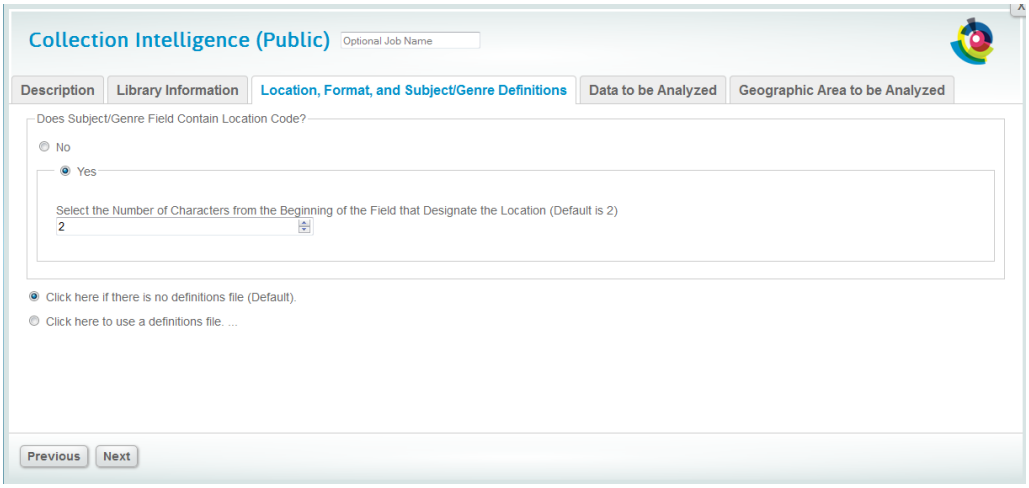
- To label the report generated
- To identify the spatial GIS point of the library's location in order to map this on map views in the report
- To calculate the drive time for each library patron from home to the library



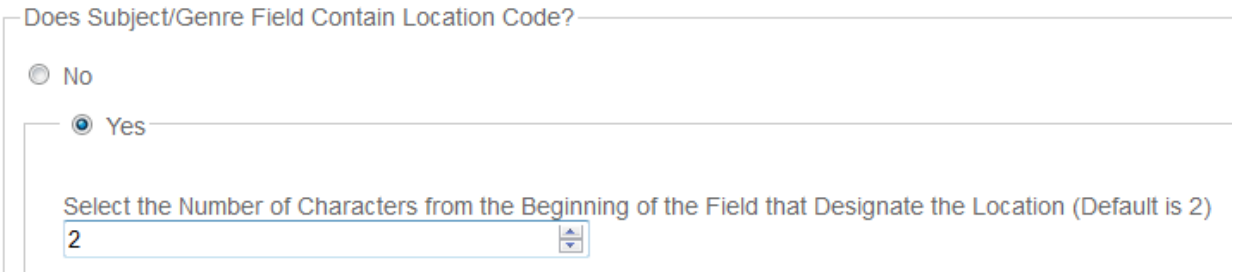
Click at the bottom left side of the screen to proceed to the next tab.

4.1.4 Collection Intelligence – Location, Format, and Subject/Genre Definitions

The **Location, Format, and Subject/Genre Definitions** tab is where you define the textual descriptions of codes stored in your ILS. You can also specify the use of a location identifier and its length.

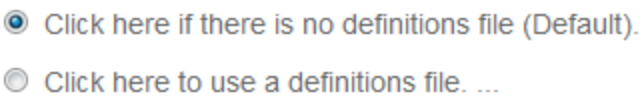

Collection Intelligence (Public)
Optional Job Name
Description
Library Information
Location, Format, and Subject/Genre Definitions
Data to be Analyzed
Geographic Area to be Analyzed
Does Subject/Genre Field Contain Location Code?
No
Yes
Select the Number of Characters from the Beginning of the Field that Designate the Location (Default is 2)
2
Click here if there is no definitions file (Default).
Click here to use a definitions file. ...
Previous
Next

The first question you must answer is whether the input file uses a location identifier. These identifiers are normally used by a multi-branch library. They identify physical branch locations.


Does Subject/Genre Field Contain Location Code?
No
Yes
Select the Number of Characters from the Beginning of the Field that Designate the Location (Default is 2)
2

Note: It your library does not use a location identifier, select **No**. That removes the next choice from consideration. If your library uses location identifiers, choose their length. The default length is two (2) characters.

The next choice is whether or not you will upload a definitions file before executing the app. The default is **No**. A definitions file is an Excel spreadsheet that translates code (identified in one column) to textual description (identified in another column).



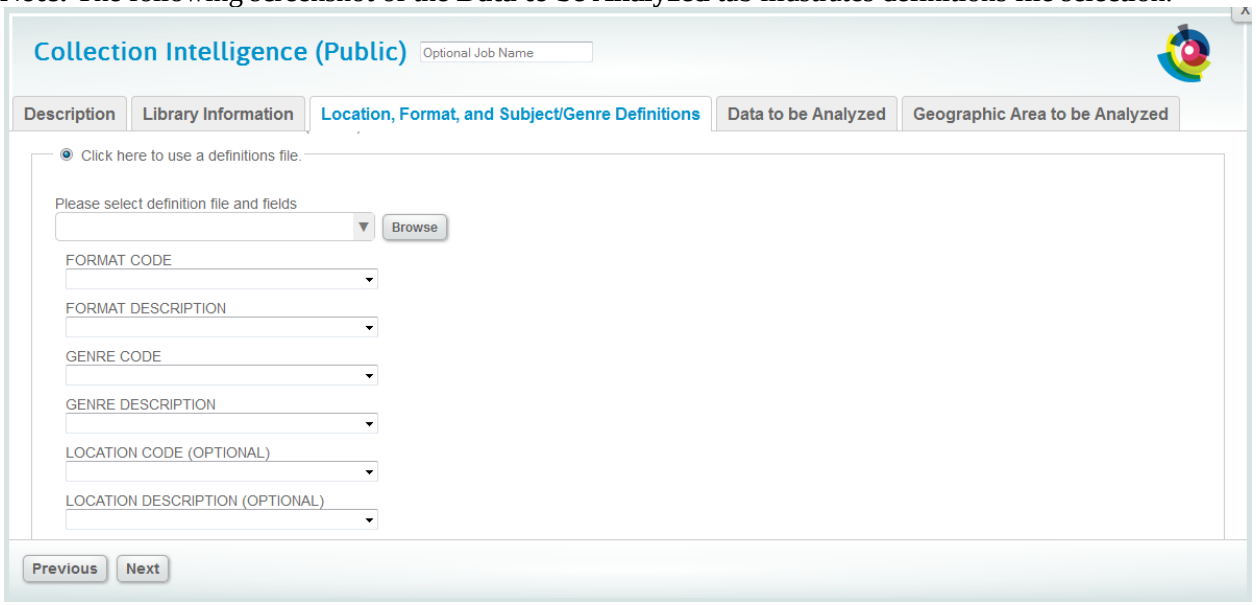
The definition file requires code and textual descriptors for format, subject/genre, and location (if used). If an ILS extract already uses a textual description of format, subject/genre, and location (if used), you usually do not use a definitions file. The following example shows a typical definition file:

Format Code	Format Description	Location code	Location Description	Genre code	Genre description
1	Adult Book	9x	Other libraries	xxx	Ignore
2	Unused	ad	Administration	abr	Blu-ray
3	Unused	cc	Farmington	acm	Cassette-Music
4	Music CD	cw	Bloomfield - East	acs	Cassette-Spoken
5	Unused	da	Bloomfield - West	adr	CD ROM
6	DO NOT USE-Video	il	Bloomfield - North	adv	DVD

If you choose to use a definitions file, click **Click here to use a definitions file…** The data input screen will expand, allowing you to browse files on your hard drive/network and chose one.

After you select a file, you will be asked to confirm the specific worksheet you have chosen. You will be required to match the correct column in each of the drop-down menus that aligns the spreadsheet to the format code and description and the genre code and description. The **Location Code** and **Location Description** drop-down lists are optional and need only be matched/aligned with the file columns if you use location identifiers.

Note: The following screenshot of the **Data to be Analyzed** tab illustrates definitions file selection.



After aligning the necessary fields, click

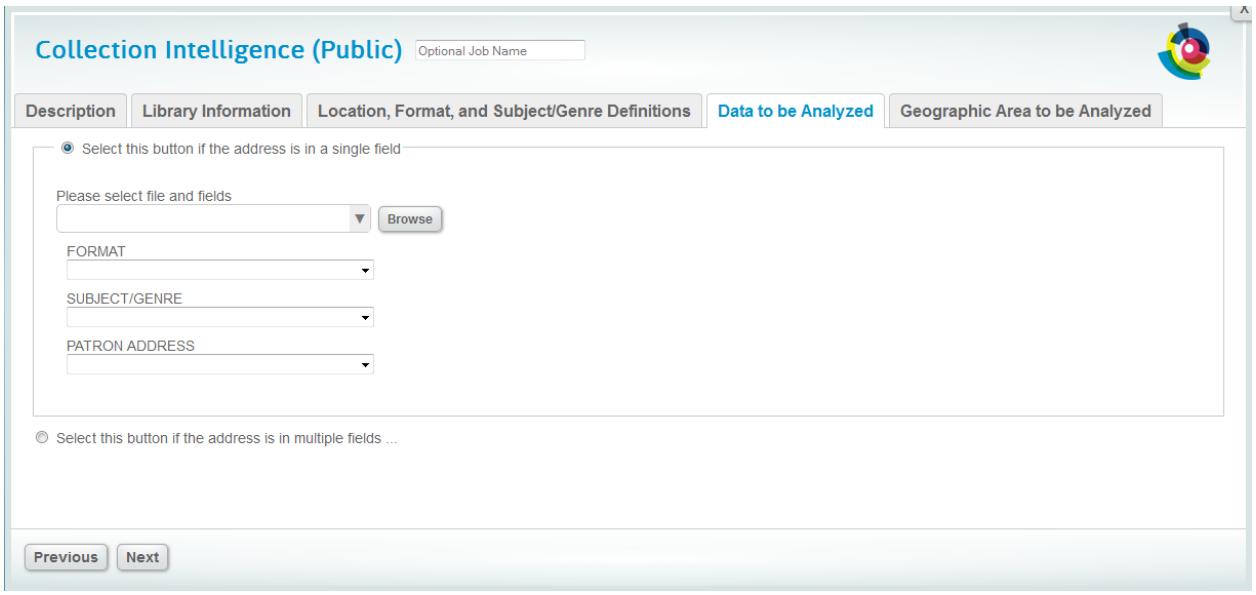
at the lower left side of the screen to proceed to the next tab.

4.1.5 Collection Intelligence – Data to be Analyzed

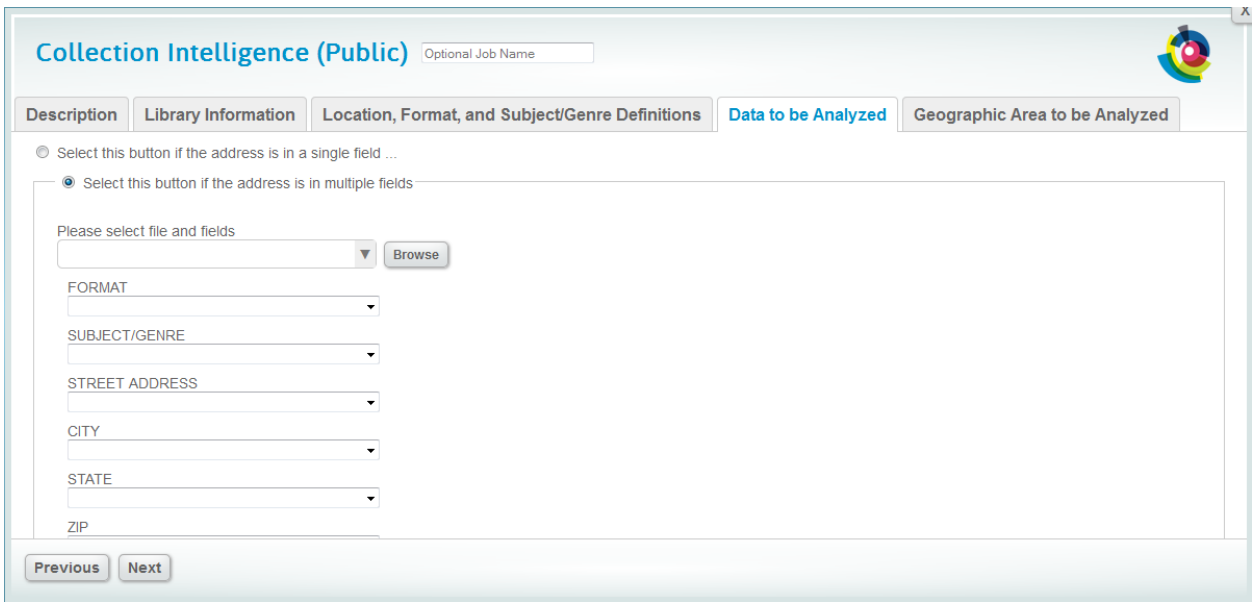
Your next step is to upload a data file—typically an Excel file—from your ILS.. This file requires three pieces of information: a) patron address, b) borrowed item format, and c) the subject/genre identifier, which is usually a high-level identifier that facilitates returning printed material to the shelf.

You can choose the types of data to include in the file. For example, it can include any type of format identifier you want to analyze. Or any subject/genre identifier can be used if it exists in the ILS. This capability allows filtering not only by the *Collection Intelligence* app—more on this to follow—but also by the ILS extract used to create the AOD input file.

The following screenshot displays an input file that includes patron address in one column. Depending on your ILS, the patron address may be extracted and placed in multiple columns—one/two for street address, one for city, one for state, and one for ZIP code. The view presented depends on the radio button you choose. The single-column address view is the default.



The following screenshot displays shows the patron address in multiple columns.

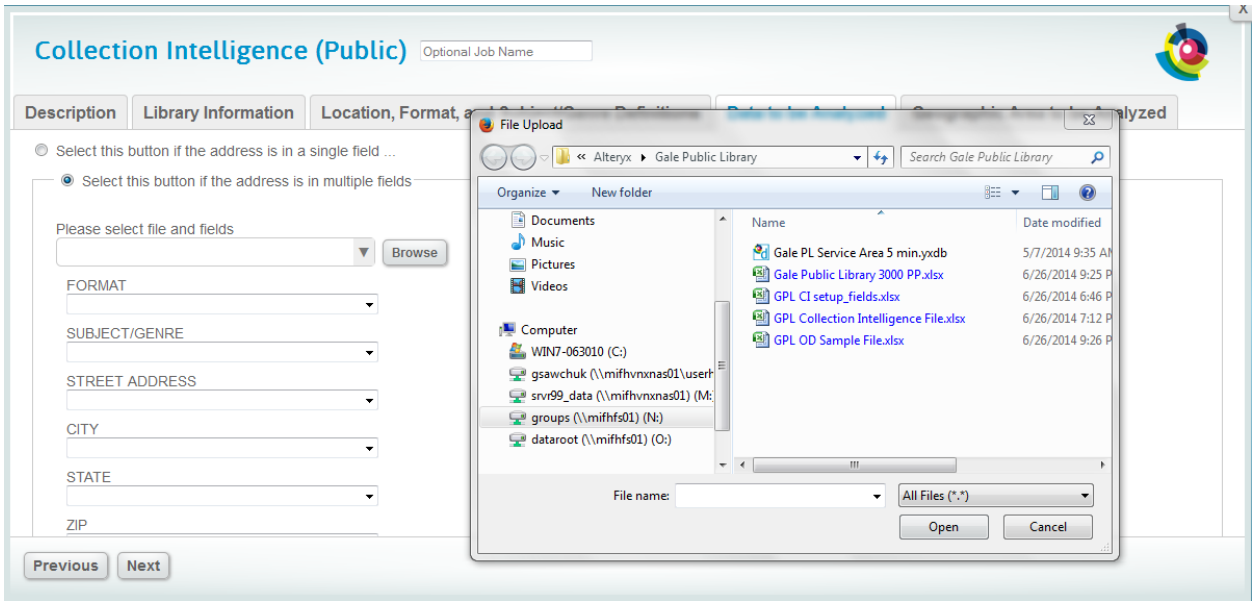


After you have selected the address format for your input file, click the Browse button to browse input files on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You must have already extracted your input file from your ILS before accessing the app.

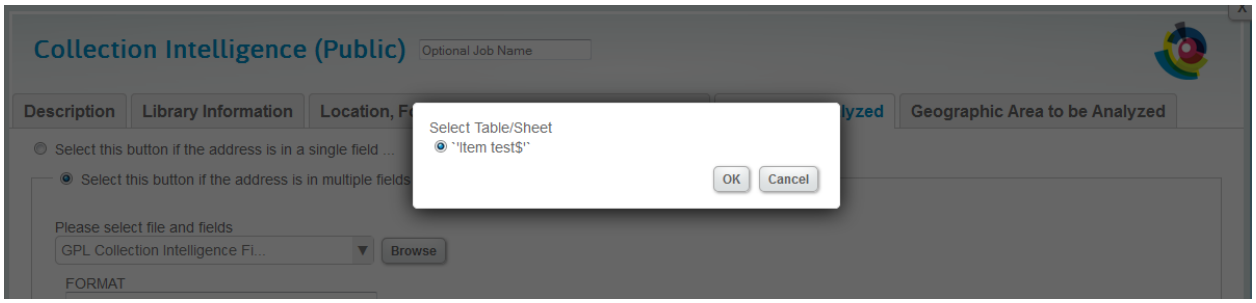
It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the app from running properly. If any problems occur during running the app, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



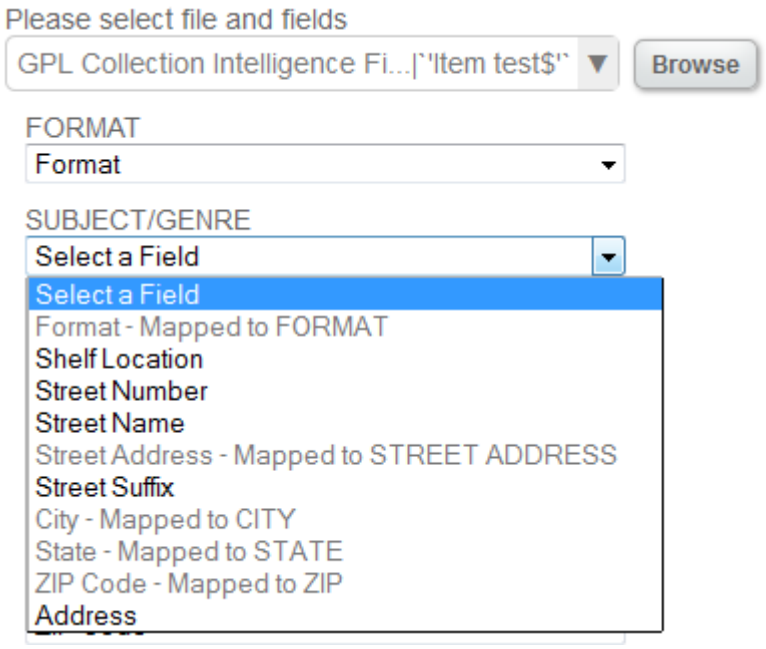
After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is the correct one by clicking OK.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



After you have confirmed the selection, AOD loads the file into the app and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (address, checkouts, and active date). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the app has selected the correct columns of data. If not, click the drop-down **Select a field** list to deselect the choice made and replace it with the correct choice.

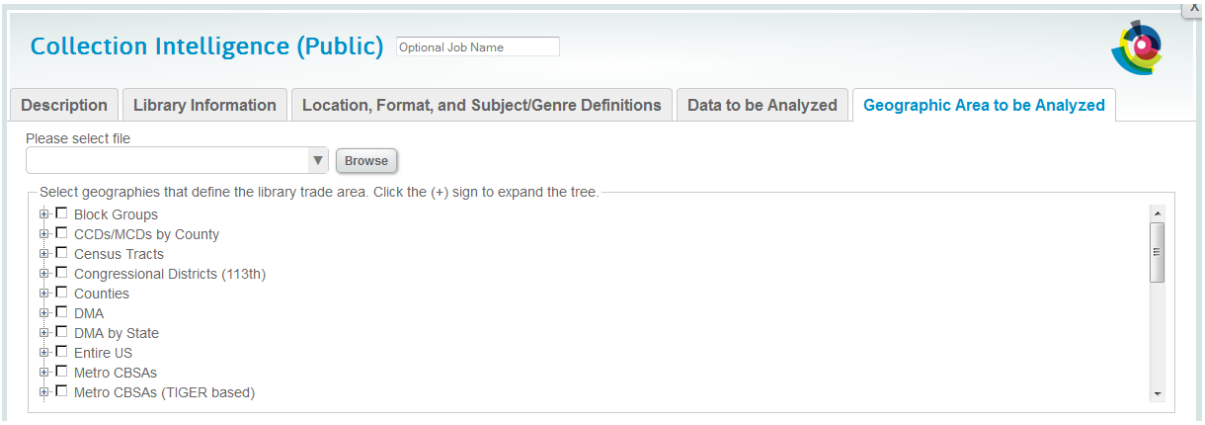
On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.



Click Next at the bottom left side of the screen to proceed to the next tab.

4.1.6 Collection Intelligence – Geographic Area to be Analyzed

Your next step is to identify the geographic area you want to analyze. Examples of geographies include a) the library's service area, b) surrounding geographies outside the service area (to analyze patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).

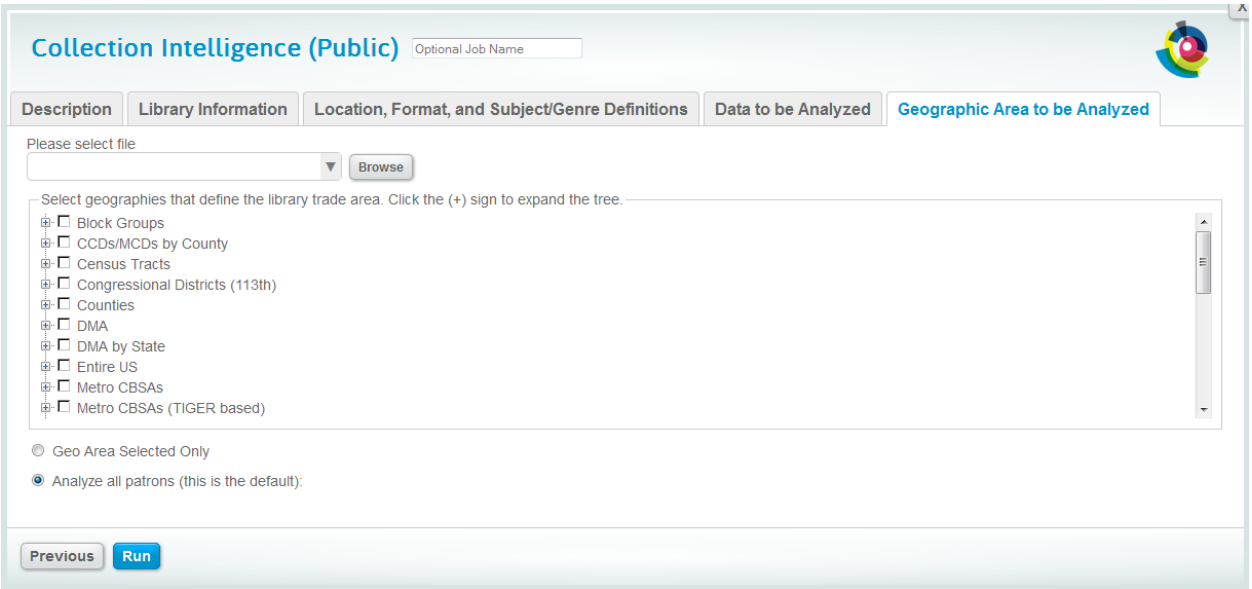


You can select geographies from the geography tree menu or upload a custom geography (GIS) file by first creating a custom geography in Gale's complimentary product, *DemographicsNow for Libraries*. If you are loading a previously saved custom geography from *DemographicsNow for Libraries*, click the Browse button at the top of the screen and locate the **.yxdb file—**the format of the saved *DemographicsNow for Libraries* custom geography file—in the directory and select it. After the file appears in the window, bypass the geography tree and move to the next filter, which appears after the geography tree.

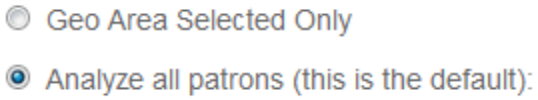
If you select a geography from the geography tree, first locate the type of geography to be loaded, such as ZIP code, county, block group, census tract, or CBS. Next, click the **+ sign** to expand the list and continue until you locate the geography you want. You may select a single geography selection by clicking the box next to it. (A check mark will appear.) You may select multiple geographies by checking the box next to each one. If you select multiple geographies, they will be combined in the analysis.

Note: If you are interested in a county, do not select all its block groups. AOD calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculations may take hours.

After you select a geography, scroll down the screen to the final filter: whether to include or exclude patrons outside the geography selected.

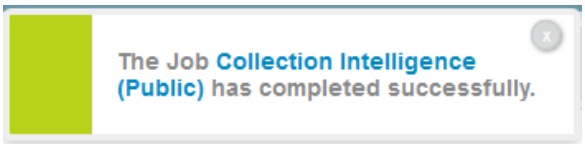


The **patron filter** looks at whether patrons live inside or outside the library service area. The default includes all patrons, regardless of where they live. Clicking **Geo Area Selected Only** includes patron only if their addresses lie within the service area geography you defined earlier.



Setting the patron filter is the final step in this process. Click

at the lower left side of the screen to begin the analysis. When the analysis completes, the following message will appear on screen if you are still logged on:



Please note that it is not necessary to wait until the analysis completes. By clicking

on the upper right side of the screen, you can return to the original app screen and the analysis will run in the background.

You can also log out or execute another AOD app analysis. If you want to make minor modifications and re-run the analysis with a different filter, select the

button at the lower left side of the screen. All your information is saved and you can modify any earlier choices to re-run the analyis.

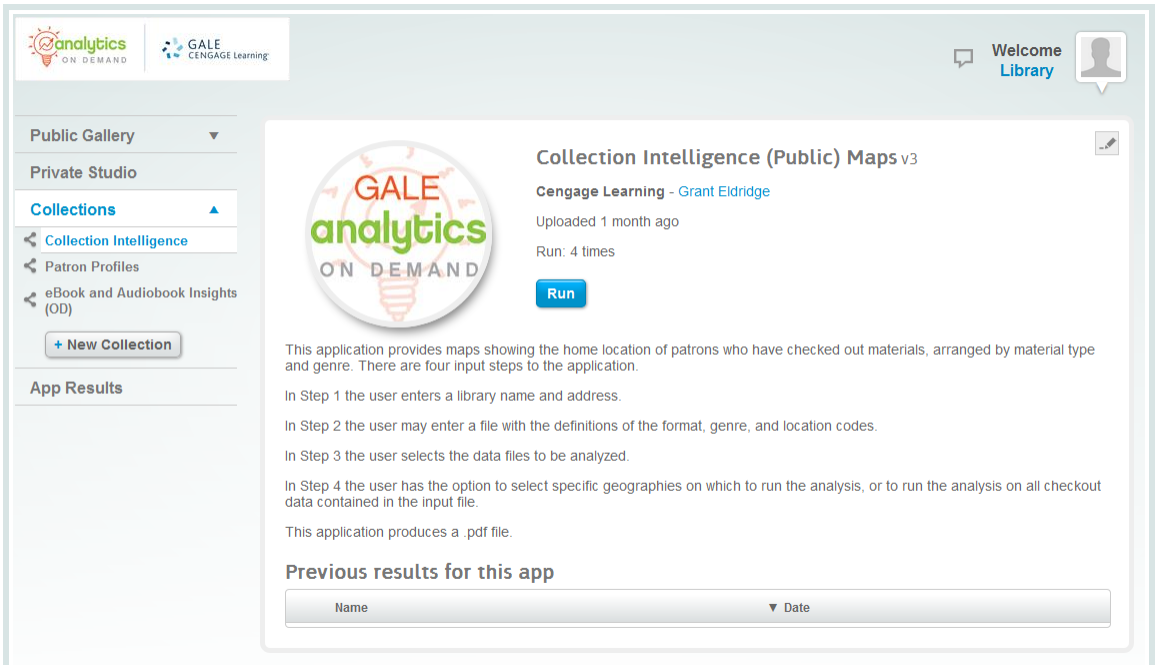
4.2 Collection Intelligence (Public) Maps

This section offers a detailed description of the *Collection Intelligence Maps* app. This app provides maps of the home locations, arranged by material type and genre, of patrons who have checked out materials.

The reports produced by *Collection Intelligence Maps* add a useful visual enhancement to the analysis of charts and tables. With the maps, you can see at a glance which portion of your trade area tends to check out various genres and formats most often.

4.2.1 Collection Intelligence Maps – Initial Screen

The following screen appears when you click the *Collection Intelligence Maps* app:


analytics ON DEMAND
GALE CENGAGE Learning
Welcome
Library
Public Gallery
Private Studio
Collections
Collection Intelligence
Patron Profiles
eBook and Audiobook Insights (OD)
+ New Collection
App Results
GALE analytics ON DEMAND
Collection Intelligence (Public) Maps v3
Cengage Learning - Grant Eldridge
Uploaded 1 month ago
Run: 4 times
Run
This application provides maps showing the home location of patrons who have checked out materials, arranged by material type and genre. There are four input steps to the application.
In Step 1 the user enters a library name and address.
In Step 2 the user may enter a file with the definitions of the format, genre, and location codes.
In Step 3 the user selects the data files to be analyzed.
In Step 4 the user has the option to select specific geographies on which to run the analysis, or to run the analysis on all checkout data contained in the input file.
This application produces a .pdf file.
Previous results for this app
Name
Date

This screen provides the following key information:

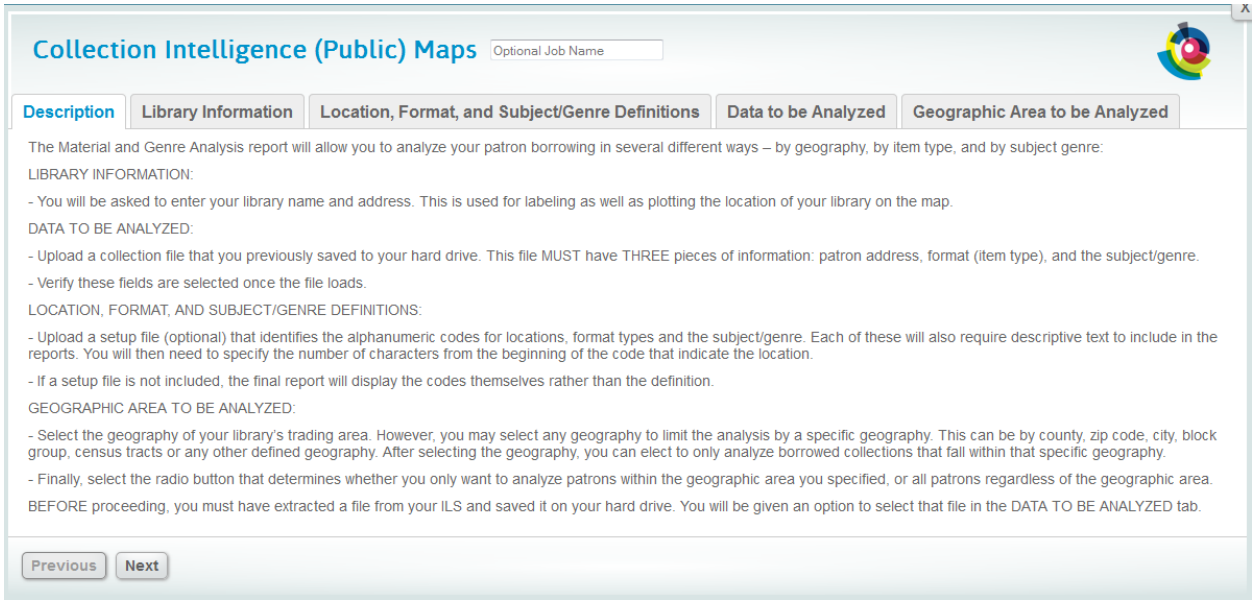
- **Version number** – When the app is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.

- **A summary description of what the customer intelligence map app does –** "This application provides maps showing the home location of patrons who have checked out materials, arranged by material type and genre. There are four input steps to the application. In Step 1 the user enters a library name and address. In Step 2 the user may enter a file with the definitions of the format, genre, and location codes. In Step 3 the user selects the data files to be analyzed. In Step 4 the user has the option to select specific geographies on which to run the analysis, or to run the analysis on all checkout data contained in the input file. This application produces a .pdf file."

- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

4.2.2 Collection Intelligence Maps – Description

When you click Run, the following screen appears. Note that the screen displays five tabs. (Some apps may have more or fewer tabs.) The **Description** tab explains what is required to run the app, including a high-level overview of the commands.


Collection Intelligence (Public) Maps
Optional Job Name
Description
Library Information
Location, Format, and Subject/Genre Definitions
Data to be Analyzed
Geographic Area to be Analyzed
The Material and Genre Analysis report will allow you to analyze your patron borrowing in several different ways – by geography, by item type, and by subject genre:
LIBRARY INFORMATION:
- You will be asked to enter your library name and address. This is used for labeling as well as plotting the location of your library on the map.
DATA TO BE ANALYZED:
- Upload a collection file that you previously saved to your hard drive. This file MUST have THREE pieces of information: patron address, format (item type), and the subject/genre.
- Verify these fields are selected once the file loads.
LOCATION, FORMAT, AND SUBJECT/GENRE DEFINITIONS:
- Upload a setup file (optional) that identifies the alphanumeric codes for locations, format types and the subject/genre. Each of these will also require descriptive text to include in the reports. You will then need to specify the number of characters from the beginning of the code that indicate the location.
- If a setup file is not included, the final report will display the codes themselves rather than the definition.
GEOGRAPHIC AREA TO BE ANALYZED:
- Select the geography of your library's trading area. However, you may select any geography to limit the analysis by a specific geography. This can be by county, zip code, city, block group, census tracts or any other defined geography. After selecting the geography, you can elect to only analyze borrowed collections that fall within that specific geography.
- Finally, select the radio button that determines whether you only want to analyze patrons within the geographic area you specified, or all patrons regardless of the geographic area.
BEFORE proceeding, you must have extracted a file from your ILS and saved it on your hard drive. You will be given an option to select that file in the DATA TO BE ANALYZED tab.
Previous
Next

This tab allows you to name an output report in the text box located in the upper left portion of the screen:

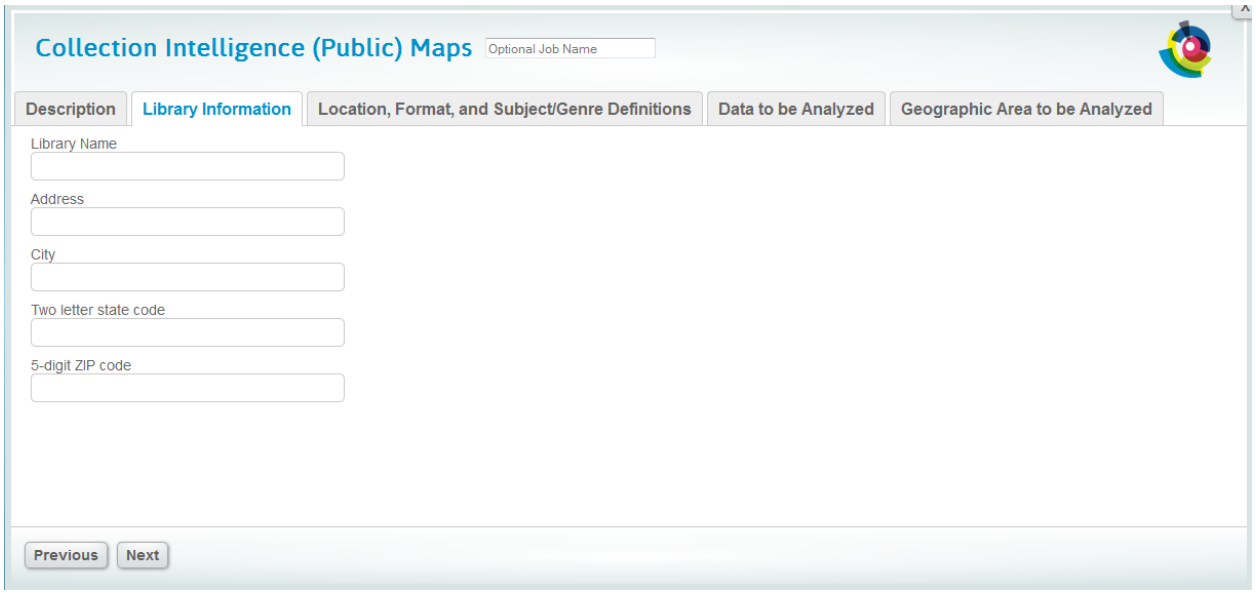
By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

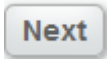
To proceed to the next tab, click the Next button on the lower left side of the screen or the tab at the top of the screen.

4.2.3 Collection Intelligence Maps – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for three purposes:

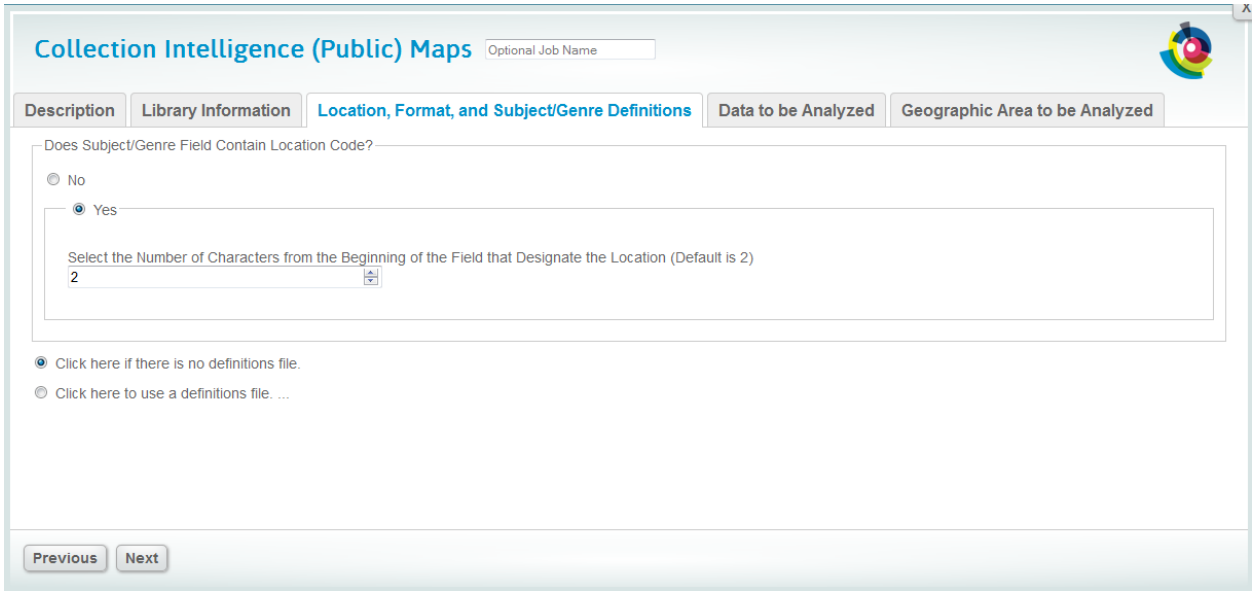
- To label the report generated
- To identify the spatial GIS point of the library's location in order to map this on map views in the report
- To calculate the drive time for each library patron from home to the library



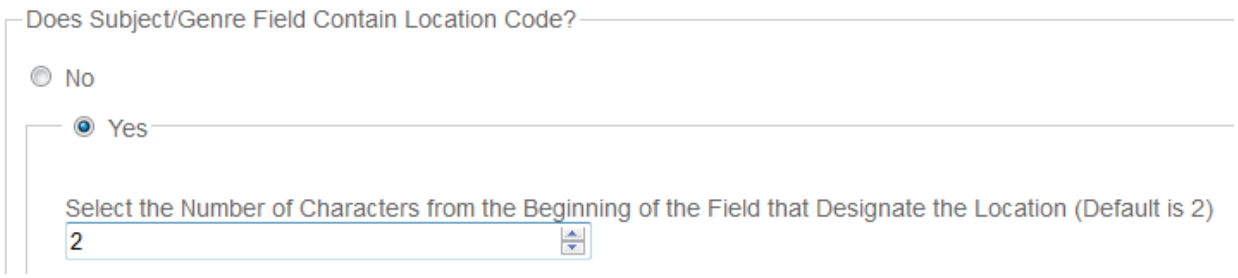
Click  at the lower left side of the screen to proceed to the next tab.

4.2.4 Collection Intelligence Maps – Location, Format, and Subject/Genre Definitions

The **Location, Format, and Subject/Genre Definitions** tab is where you define the textual descriptions of codes stored in your ILS. You can also specify the use of a location identifier and its length.

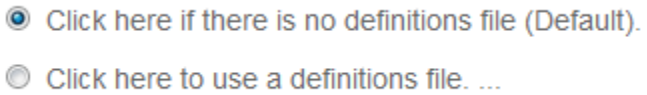

Collection Intelligence (Public) Maps
Optional Job Name
Description
Library Information
Location, Format, and Subject/Genre Definitions
Data to be Analyzed
Geographic Area to be Analyzed
Does Subject/Genre Field Contain Location Code?
No
Yes
Select the Number of Characters from the Beginning of the Field that Designate the Location (Default is 2)
2
Click here if there is no definitions file.
Click here to use a definitions file. ...
Previous
Next

The first question you must answer is whether the input file uses a location identifier. These identifiers are normally used by a multi-branch library. They identify physical branch locations.


Does Subject/Genre Field Contain Location Code?
No
Yes
Select the Number of Characters from the Beginning of the Field that Designate the Location (Default is 2)
2

Note: It your library does not use a location identifier, select **No**. That removes the next choice from consideration. If your library uses location identifiers, you must choose their length. The default length is two (2) characters.

The next question is whether or not you will upload a definitions file before executing the app. The default is **No**. A definitions file is an Excel spreadsheet that translates code (identified in one column) to textual description (identified in another column).



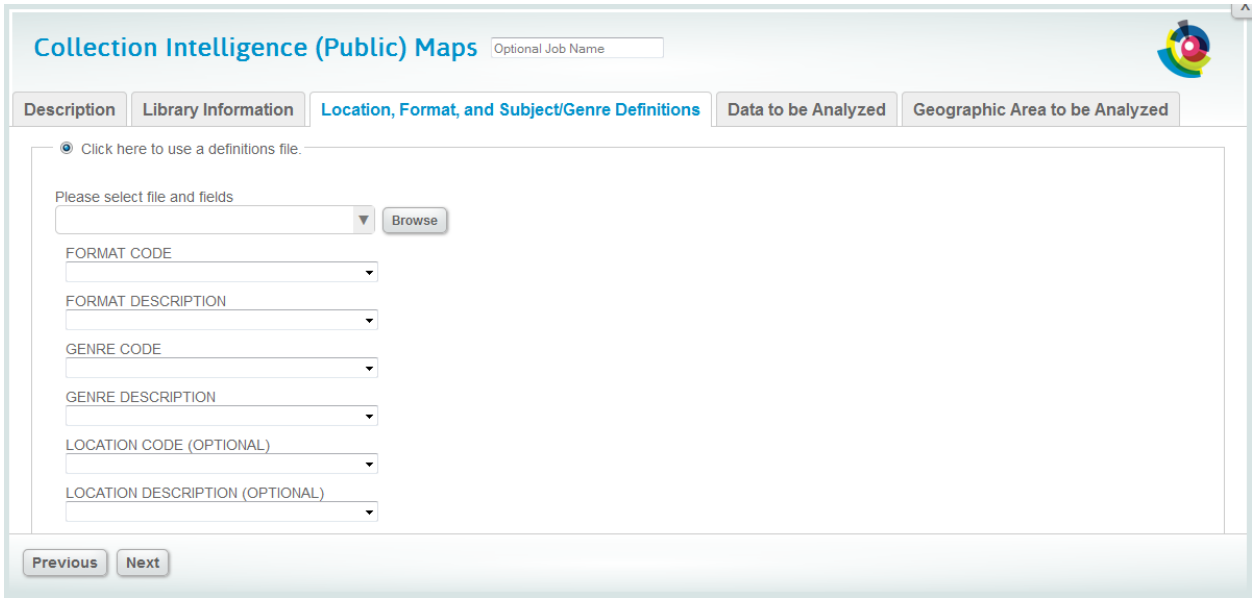
The definition file requires code and textual descriptors for format, subject/genre, and location (if used). If an ILS extract already uses a textual description for format, subject/genre, and location (if used), you usually do not use a definitions file. The following example shows a typical definitions file:

Format Code	Format Description	Location code	Location Description	Genre code	Genre description
1	Adult Book	9x	Other libraries	xxx	Ignore
2	Unused	ad	Administration	abr	Blu-ray
3	Unused	cc	Farmington	acm	Cassette-Music
4	Music CD	cw	Bloomfield - East	acs	Cassette-Spoken
5	Unused	da	Bloomfield - West	adr	CD ROM
6	DO NOT USE-Video	il	Bloomfield - North	adv	DVD

If you are using a definitions file, click **Click here to use a definitions file…** A data input screen will expand, allowing you to browse files on your hard drive/network and select one.

When you have selected a file, you will be asked to confirm the specific worksheet you have chosen. You will be required to match the correct column in each of the drop-down menus that aligns the spreadsheet to the format code and description and genre code and description. The **Location Code** and **Location Description** drop-down lists are optional and need only be matched/aligned with the file columns if you are using location identifiers.

Note: The following screenshot of the **Data to be Analyzed** tab illustrates definitions file selection.



After aligning all the necessary fields, click

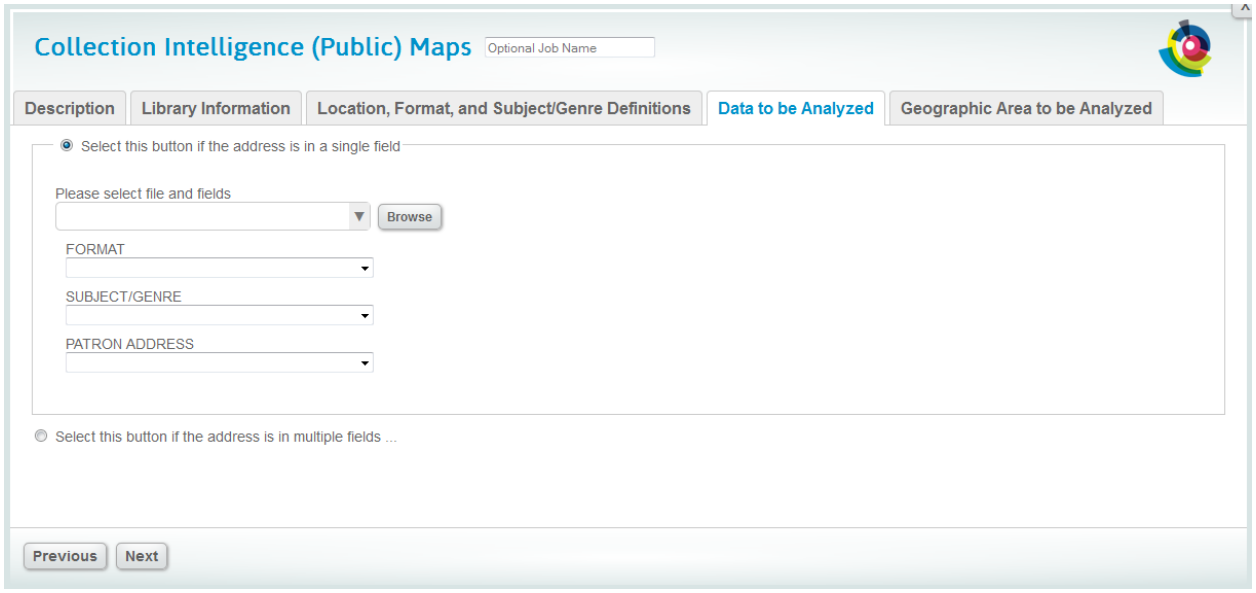
at the lower left side of the screen to proceed to the next tab.

4.2.5 Collection Intelligence – Data to be Analyzed

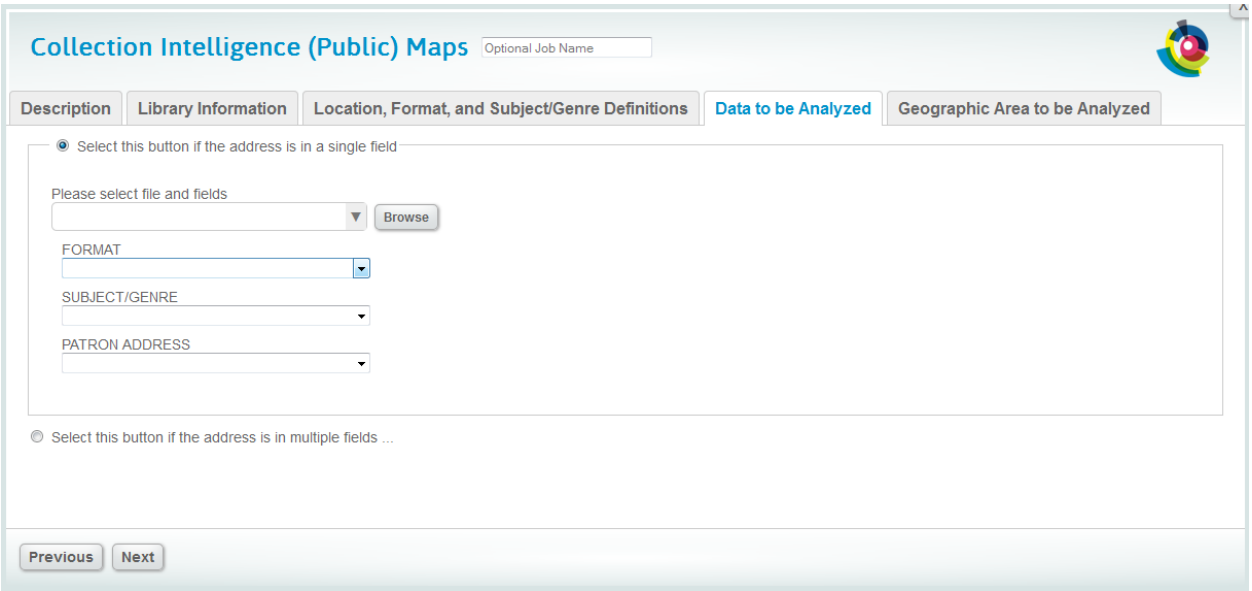
Your next step is to upload a data file—typically an Excel file—from your ILS. This file requires three specific pieces of information: a) patron address, b) borrowed item format, and c) the subject/genre identifier, which is usually a high-level identifier that facilitates returning printed material to the shelf.

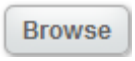
You can choose the types of data to include in the file. For example, it can include any type of format identifier you want to analyze. Or you can use any subject/genre identifier if it exists in the ILS. This capability allows filtering not only by the *Collection Intelligence* app—more on this to follow—but also by the ILS extract used to create the AOD input file.

The following screenshot displays an input file that includes patron address in one column. Depending on your ILS, the patron address may be extracted and placed in multiple columns—one/two for street address, for city, one for state, and one for ZIP code. The view presented depends on your choice of radio button. Please note that the single-column address view is the default.



The following screenshot displays shows the patron address in multiple columns.

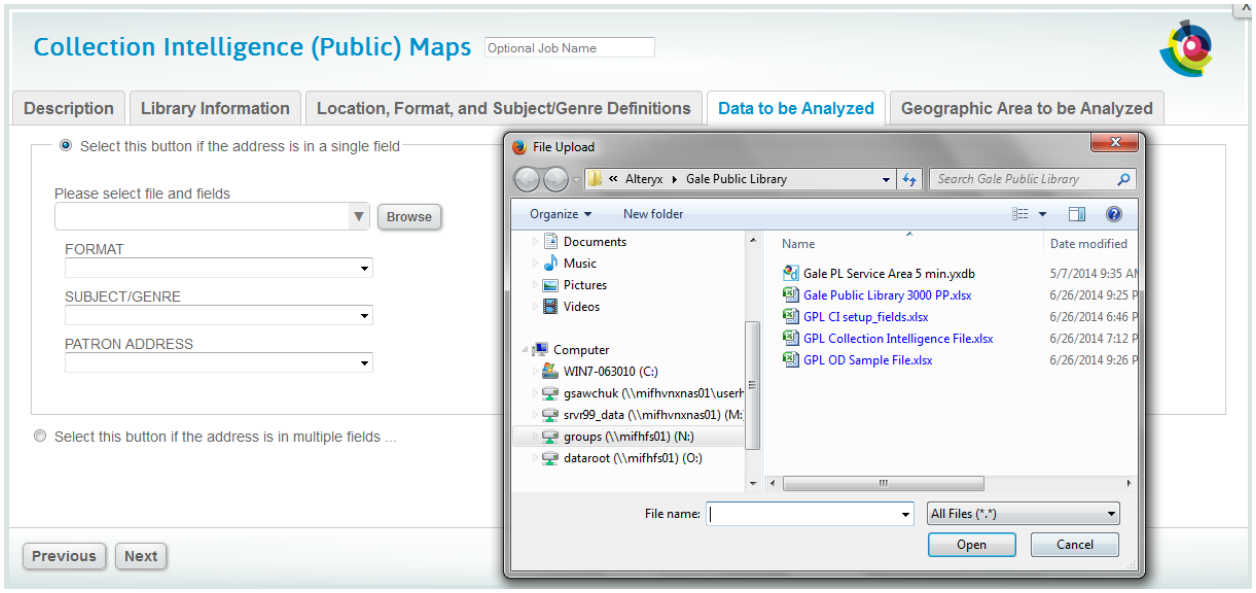


After you have selected the address format for your input file, click the  button to browse input files on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop up screen appears and asks you to identify the directory where the input file is located.

Note: You must have already extracted your input file from your ILS before accessing the app.

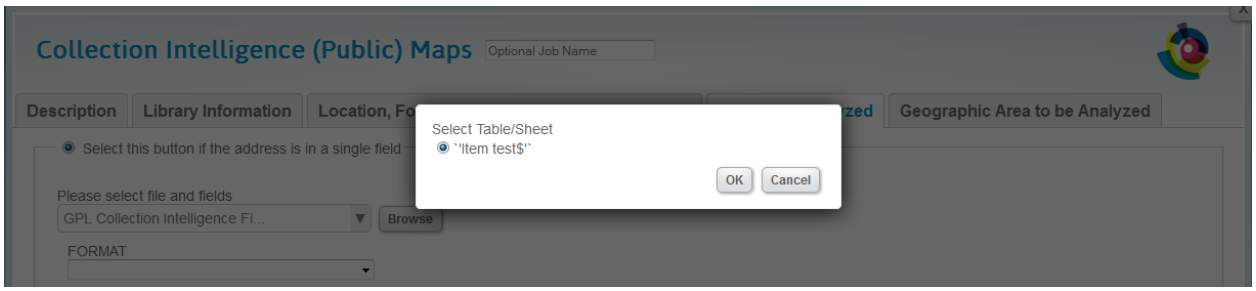
It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the app from running properly. If any problems occur during running the app, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



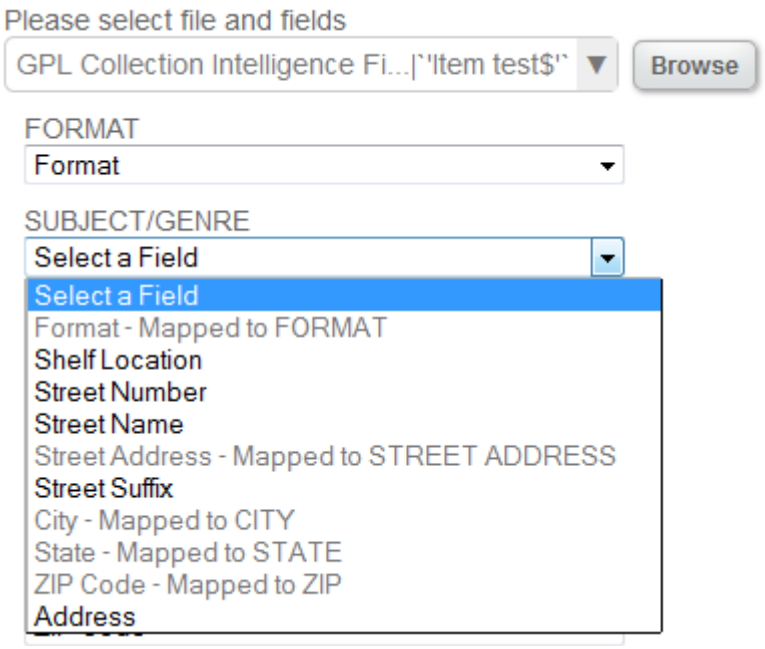
After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is correct by clicking OK.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



After you have confirmed the selection, AOD loads the file into the app and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (address, checkouts, and active date). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. First, verify that the app has selected the correct columns of data. If not, click the drop-down **Select a field** box to deselect the choice made and replace it with the correct choice.

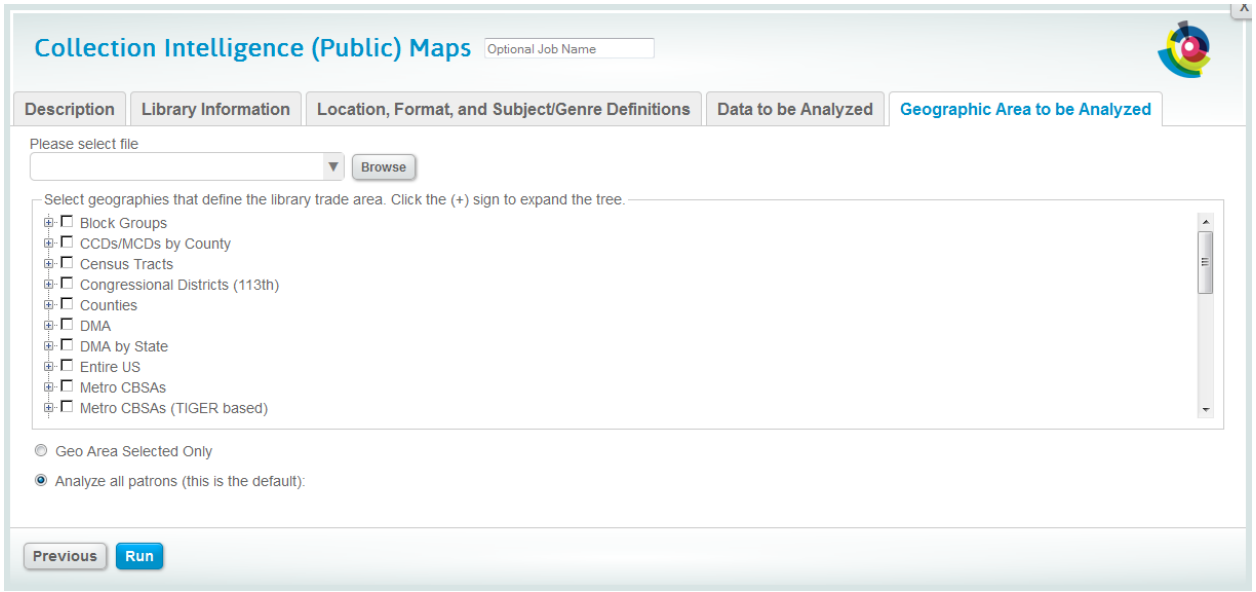
On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.



Click at the lower left side of the screen to proceed to the next tab.

4.2.6 Collection Intelligence – Geographic Area to be Analyzed

Your next step is to identify the geographic area you want to analyze. Examples of geographies include a) the library's service area, b) surrounding geographies outside the service area (to analyze patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).



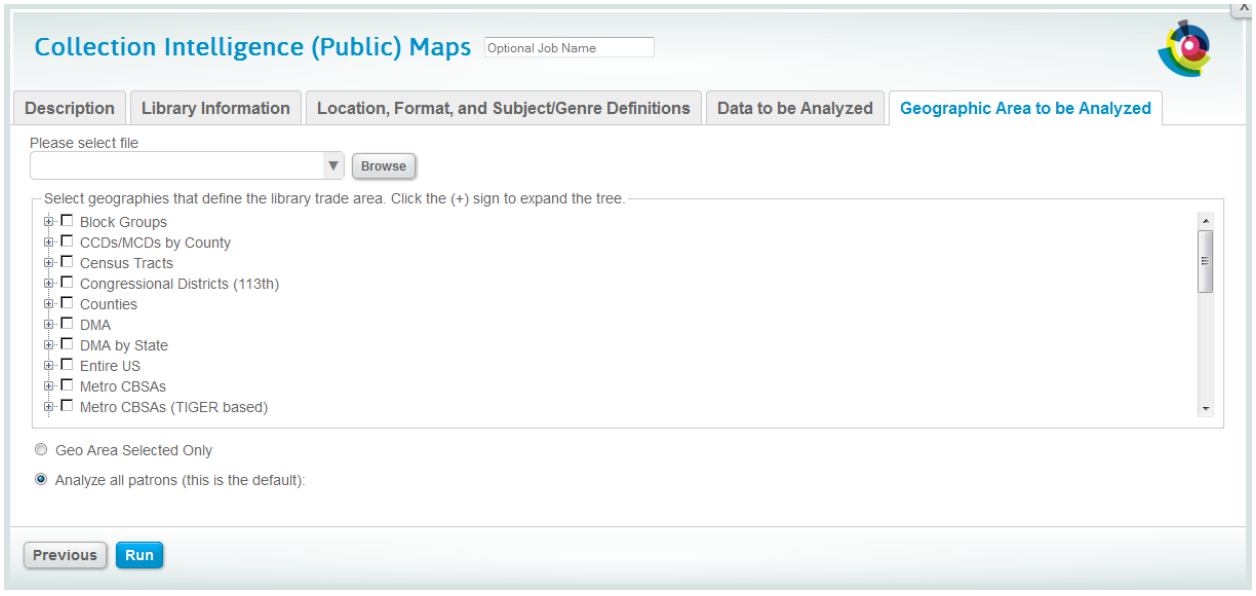
The next step, after selecting a geography, is to scroll down the page and answer the final question, whether the analysis will exclude patrons outside the geography selected or include them.

You can select geographies from the geography tree menu or upload a custom geography (GIS) file by first creating a custom geography in Gale's complimentary product, *DemographicsNow for Libraries*. If you are loading a previously saved custom geography from *DemographicsNow for Libraries*, click the Browse button at the top of the screen and locate the **.yxdb file—**the format of the saved *DemographicsNow for Libraries* custom geography file—in the directory and select it. Once the file appears in the file window, bypass the geography tree and move to the next filter, which appears after the geography tree.

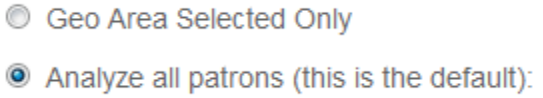
If selecting a geography from the geography tree, first locate the type of geography to be loaded, such as ZIP code, county, block group, census tract, or CBSA. Next, click the **+ sign** to expand the list and continue until you locate the geography you want. You may select a single geography selection by clicking the box next to it. (A check mark will appear.) You may select multiple geographies by checking the box next to each one. If you select multiple geographies, they will be combined in the analysis.

Note: If you are interested in a county, do not select all its block groups. AOD calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculation may take hours.

After you select a geography, scroll down the screen to the final filter: whether to include or exclude patrons outside the geography selected.

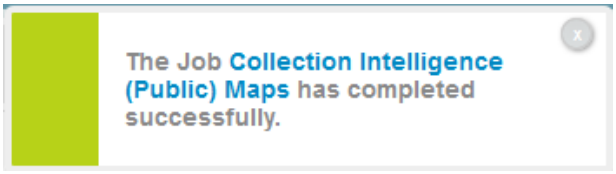


The **patron filter** looks at whether patrons live inside or outside the library service area. The default includes all patrons, regardless of where they live. Clicking **Geo Area Selected Only** includes patrons only if their addresses lie within the service area geography you defined earlier.



Setting the patron filer is the final step in this process. Click

on the lower left side of the screen to begin the analysis. When the analysis completes, the following message will appear on screen you are still logged on:



Please note that it is not necessary to wait until the analysis completes. By clicking

at the upper right side of the screen, you can return to the original app screen and the analysis will run in the background.

You can also log out or execute another AOD app analysis. If you want to make minor modifications and re-run the analysis with a different filter, select the

button at the lower left side of the screen. All your information is saved and you can modify any earlier choices to re-run the analyis.

5.0 EBOOK & AUDIOBOOK INSIGHTS (OD)

5.0 EBOOK & AUDIOBOOK INSIGHTS (OD)

This section provides a detailed description of the *eBook & audioBooks Insights* apps, which is comprised of *eBook & audioBook Insights (OD)* and *eBook & audioBook Insights Maps (OD)*.

5.1 eBook & audioBook Insights (OD)

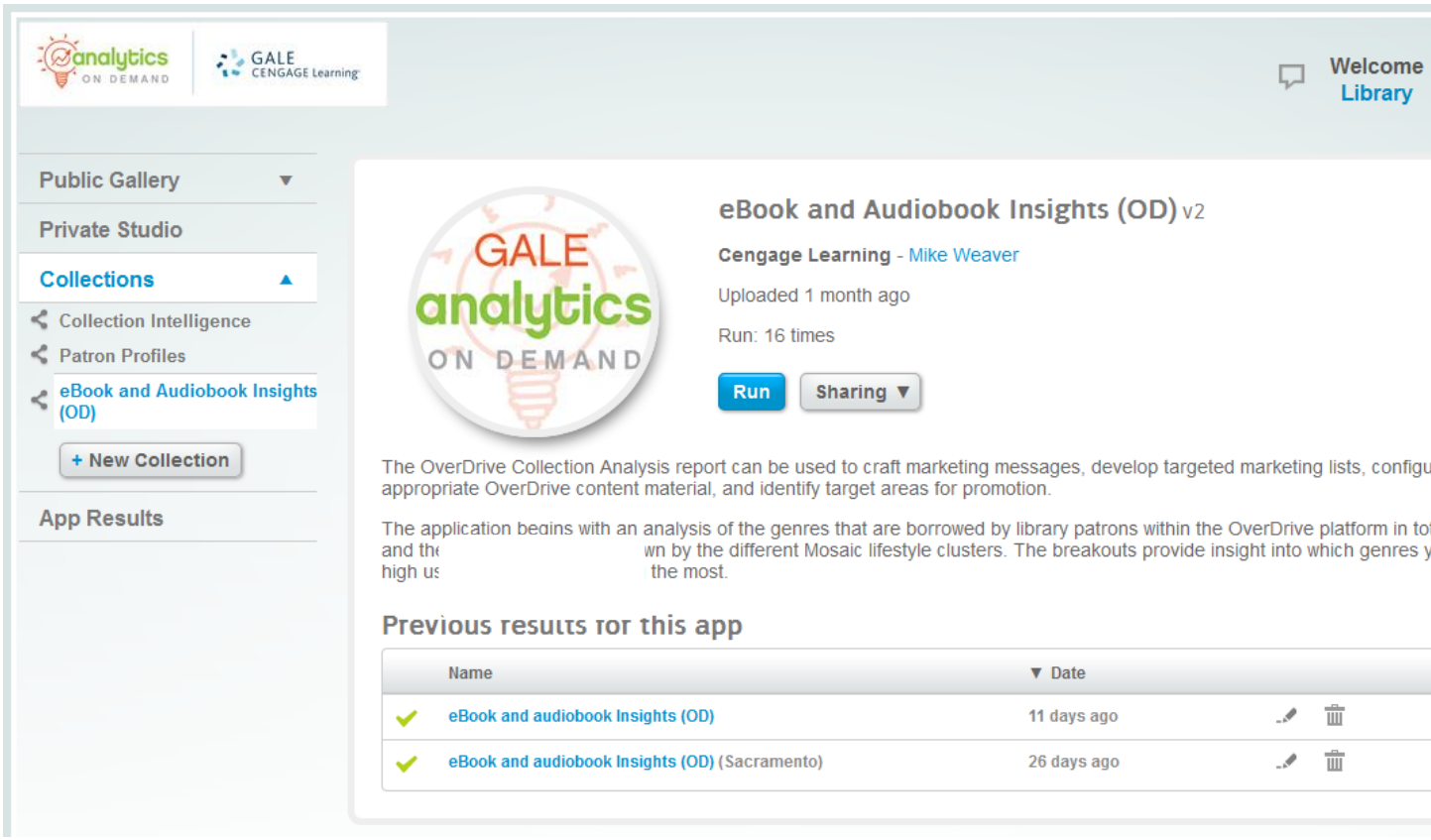
This section provides a detailed description of the *eBook & audioBook Insights (OD)* app. This app explains the electronic materials a public library's customers are—and aren't—borrowing on the OverDrive eBook platform. It enables a public library to make data-driven decisions and drive meaningful outcomes for itself and the community it serves.

You can use *eBook & audioBook Insights* (OD) reports to craft marketing messages, develop targeted marketing lists, configure appropriate OverDrive content material, and identify target areas for promotion.

The app begins with an analysis of the genres that are borrowed by library patrons within the OverDrive platform in total and then breaks the genres down into different Mosaic lifestyle clusters. The breakouts provide insight into which genres your high-use patrons are borrowing most frequently.

5.1.1 eBook & audioBook Insights (OD) – Initial Screen

The following screen appears when you click the *eBook & audioBook Insights (OD)* app:



This screen provides the following key information:

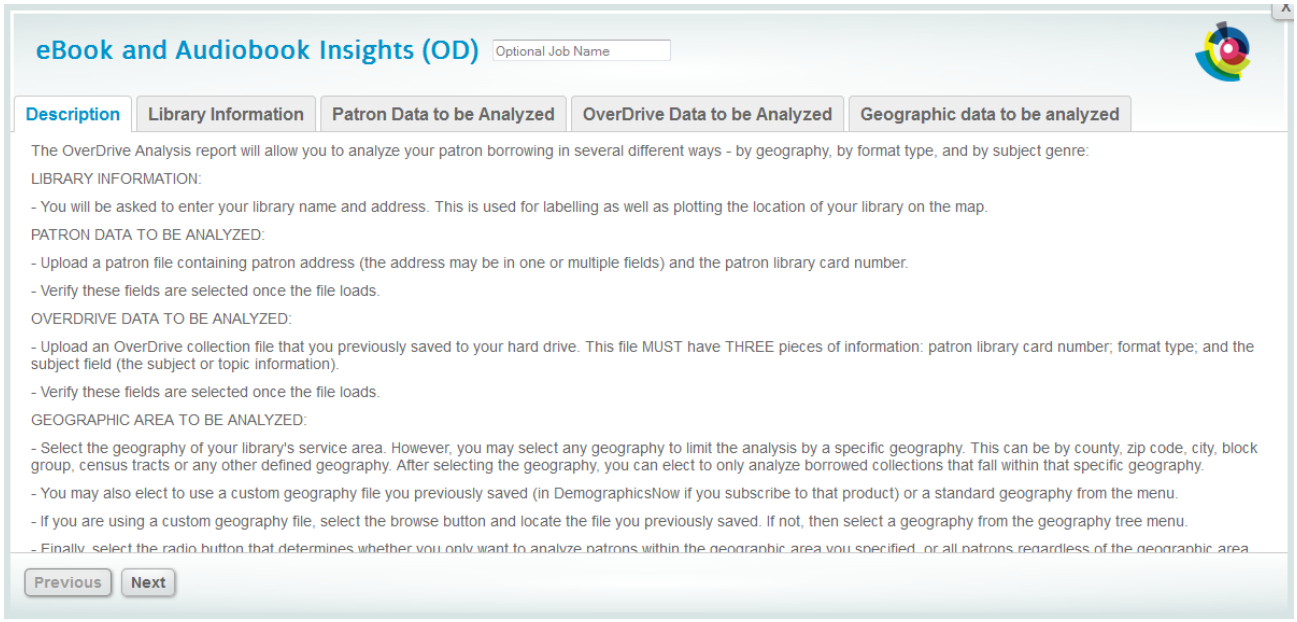
Version number – When the app is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.

- **A summary description of what the customer intelligence app does:** "The OverDrive Collection Analysis report can be used to craft marketing messages, develop targeted marketing lists, configure appropriate OverDrive content material, and identify target areas for promotion. The application begins with an analysis of the genres that are borrowed by library patrons within the OverDrive platform in total, and then breaks the genres down by the different Mosaic lifestyle clusters. The breakouts provide insight into which genres your high use patrons are borrowing the most."
- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

5.1.2 eBook & audioBook Insights (OD) – Description

When you click

, the following screen appears. Note that the screen displays five tabs. (Some apps may have more or fewer tabs.) The **Description** tab explains what is required to run the app, including a high-level overview of the commands.


eBook and Audiobook Insights (OD)
Optional Job Name
Description
Library Information
Patron Data to be Analyzed
OverDrive Data to be Analyzed
Geographic data to be analyzed
The OverDrive Analysis report will allow you to analyze your patron borrowing in several different ways - by geography, by format type, and by subject genre:
LIBRARY INFORMATION:
- You will be asked to enter your library name and address. This is used for labelling as well as plotting the location of your library on the map.
PATRON DATA TO BE ANALYZED:
- Upload a patron file containing patron address (the address may be in one or multiple fields) and the patron library card number.
- Verify these fields are selected once the file loads.
OVERDRIVE DATA TO BE ANALYZED:
- Upload an OverDrive collection file that you previously saved to your hard drive. This file MUST have THREE pieces of information: patron library card number; format type; and the subject field (the subject or topic information).
- Verify these fields are selected once the file loads.
GEOGRAPHIC AREA TO BE ANALYZED:
- Select the geography of your library's service area. However, you may select any geography to limit the analysis by a specific geography. This can be by county, zip code, city, block group, census tracts or any other defined geography. After selecting the geography, you can elect to only analyze borrowed collections that fall within that specific geography.
- You may also elect to use a custom geography file you previously saved (in DemographicsNow if you subscribe to that product) or a standard geography from the menu.
- If you are using a custom geography file, select the browse button and locate the file you previously saved. If not, then select a geography from the geography tree menu.
Previous
Next

This tab allows you to name an output report in the text box located in the upper left portion of the screen:

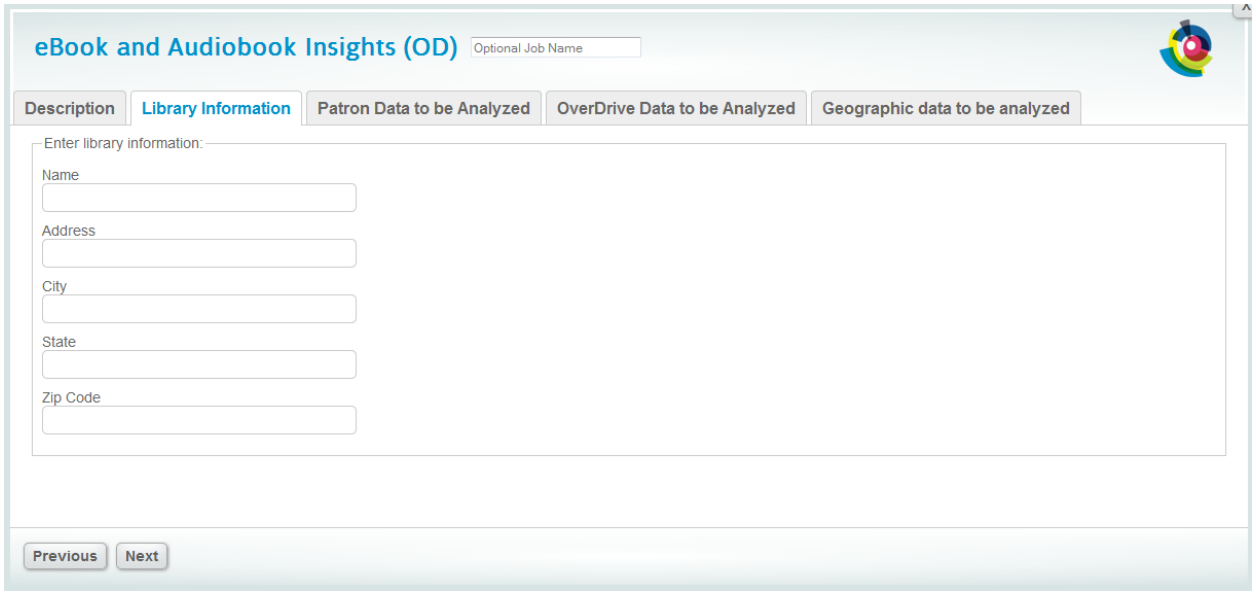
By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

To proceed to the next tab, click the Next button on the lower left side of the screen or the tab at the top of the screen.

5.1.3 eBook & audioBook Insights (OD) – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for three purposes:

- To label the report generated
- To identify the spatial GIS point of the library's location in order to map this on map views in the report
- To calculate the drive time for each library patron from home to the library



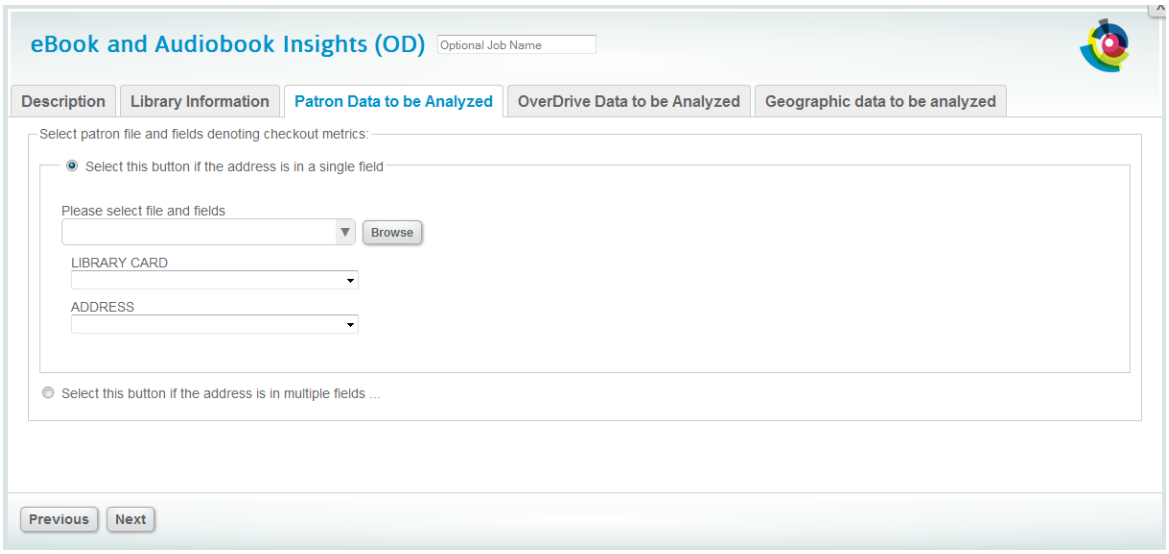
Click Next at the lower left side of the screen to proceed to the next tab.

5.1.4 eBook & audioBook Insights (OD) – Patron Data to be Analyzed

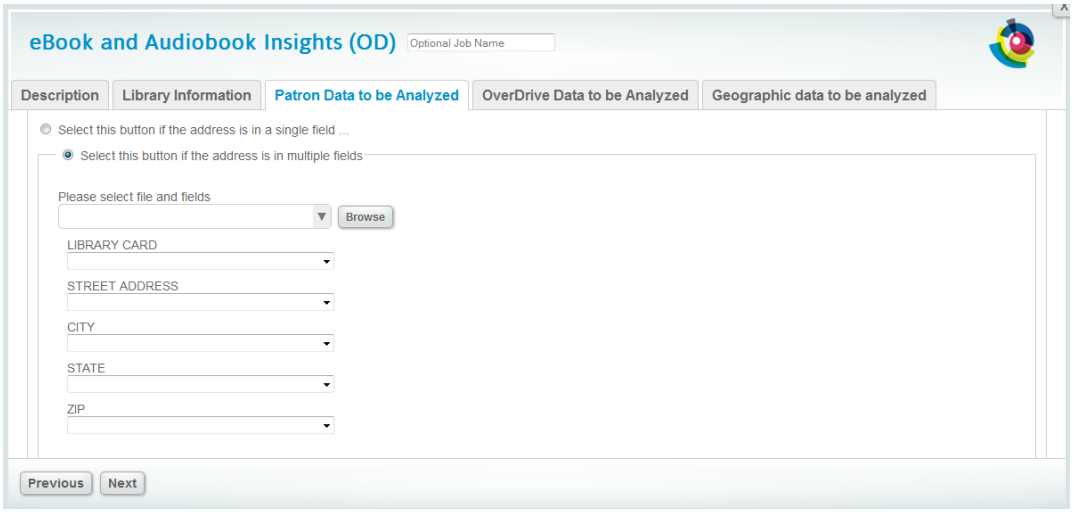
The next tab, **Patron Data to be Analyzed**, is where you upload the patron data file—normally an Excel— from your ILS. This file requires two specific pieces of information: a unique patron identifier (the patron's library card number or OverDrive identifier) and the patron's address.

The following screenshots show data for an input file that includes a patron address. Depending on your ILS, a patron address may be extracted and placed in multiple columns—one or two for street address, one for city, one for state, and one for ZIP code. The view presented depends on the radio button you choose. The single-column address view is the default.

This screen shows the single-column address view.


eBook and Audiobook Insights (OD)
Optional Job Name
Description
Library Information
Patron Data to be Analyzed
OverDrive Data to be Analyzed
Geographic data to be analyzed
Select patron file and fields denoting checkout metrics:
Select this button if the address is in a single field
Please select file and fields
Browse
LIBRARY CARD
ADDRESS
Select this button if the address is in multiple fields ...
Previous
Next

The following screen shows the multiple-column address view.

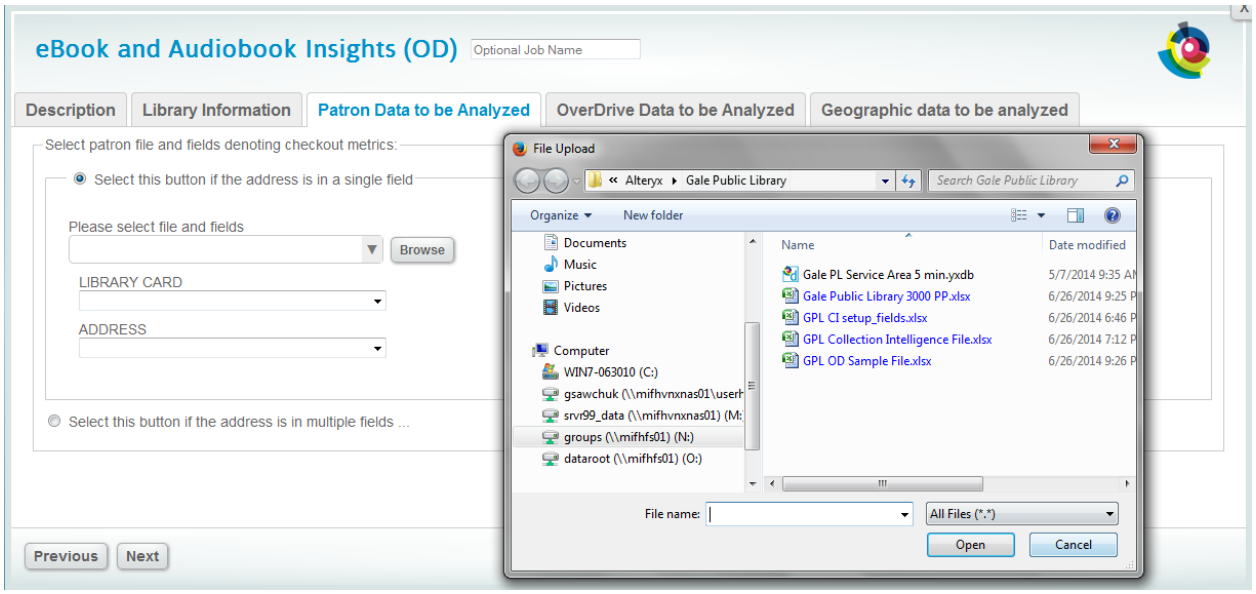


Once you select the address radio button for your input file, the next step is to click the Browse button to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You must have already extracted your input file from your ILS before accessing the app.

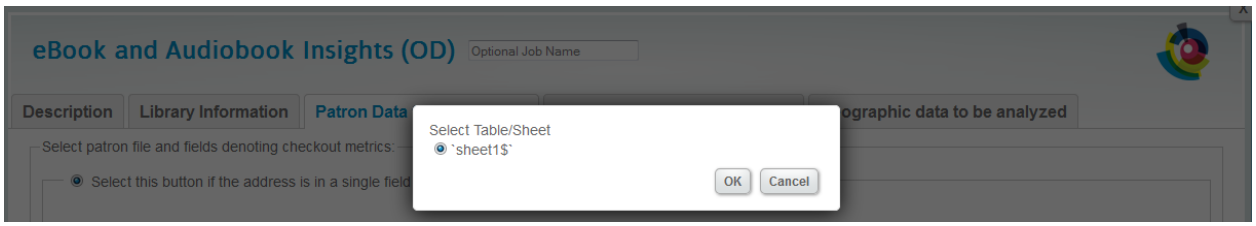
It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the app from running properly. If any problems occur during running the app, contact Gale Customer Care.

As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is correct by clicking OK.

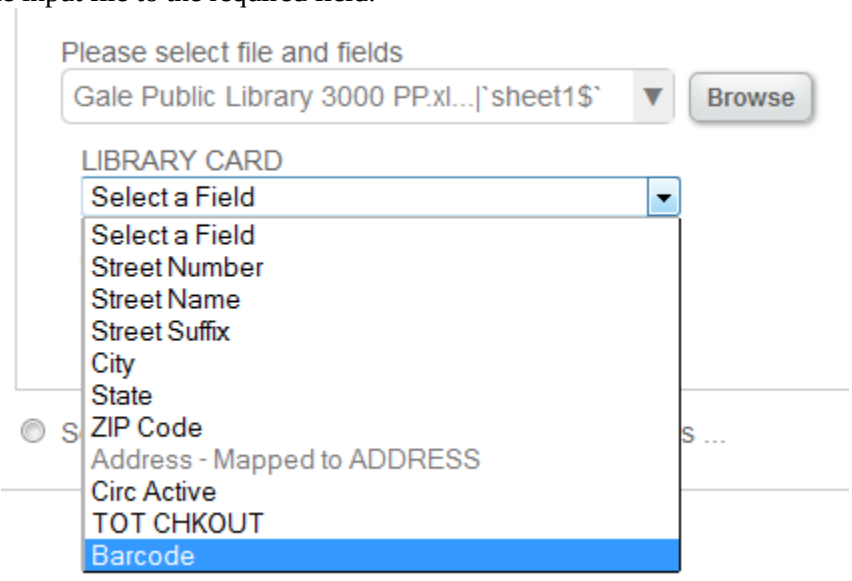
Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.

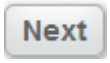


After you have confirmed the selection, AOD loads the file into the app and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (address, checkouts, and active date). If the heading in the input file is similar to the descriptive name on the screen

AOD auto-selects that column. Verify that the app has selected the correct columns of data. If not, click the drop-down **Select a field** list to deselect the choice made and replace it with the correct choice.

On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.

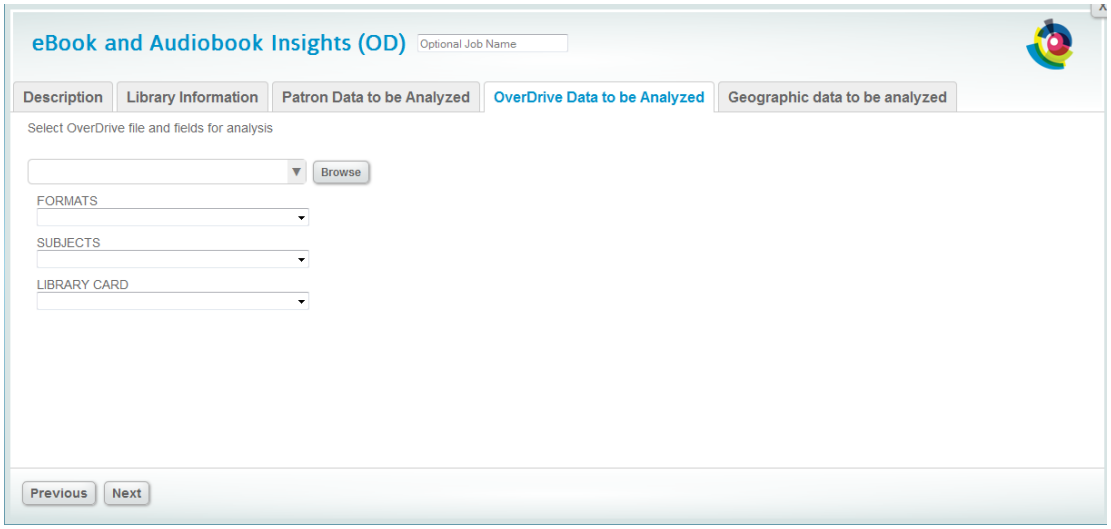


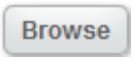
Click  at the lower left side of the screen to proceed to the next tab.

5.1.5 eBook & audioBook Insights (OD) – OverDrive Data to be Analyzed

Your next step is to upload a data file—typically an Excel file—from your OverDrive System. This file requires three specific pieces of information: a) borrowed item format, b) the subject/genre identifier, which is usually a high-level identifier that facilitates returning printed material to the shelf, and c) the unique patron identifier (library card number or OverDrive number if it is also stored in the ILS).

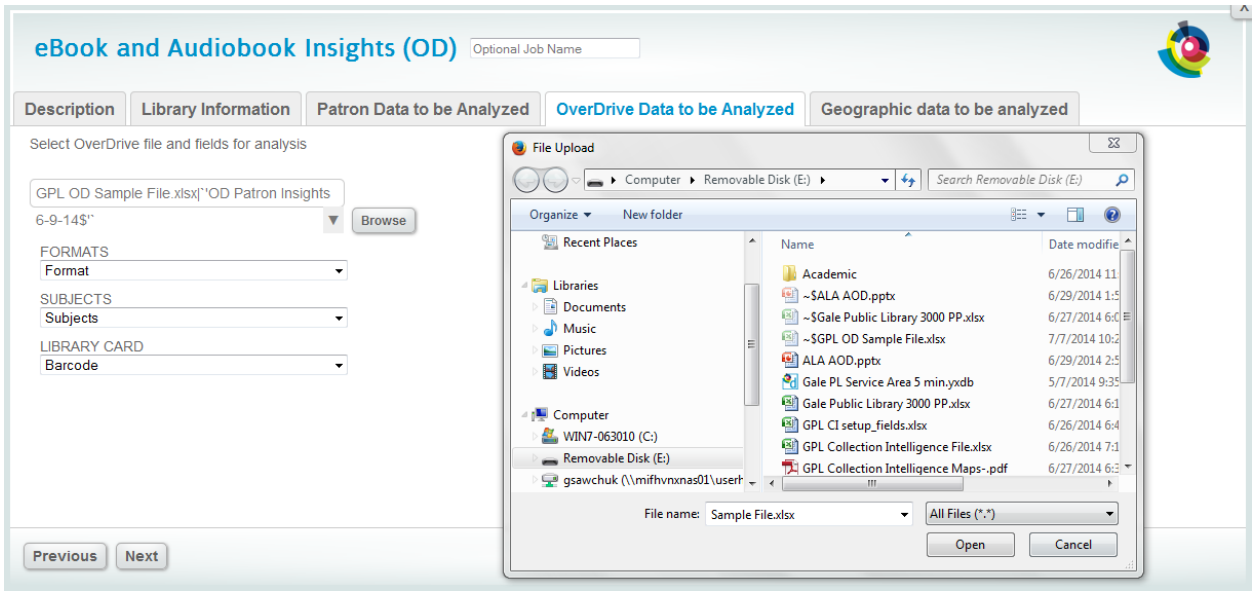
You can choose the types of data to include in the file. For example, it can include any type of format identifier you want to analyze. Or you can use any subject/genre identifier if it exists in the OverDrive system. This capability allows filtering not only by the *eBook &audiobook Insights* app—more on this to follow—but also by the OverDrive extract used to create the AOD input file.



The next step is to click  to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking on browse, a pop-up screen asks you to identify the directory where the input file is located.

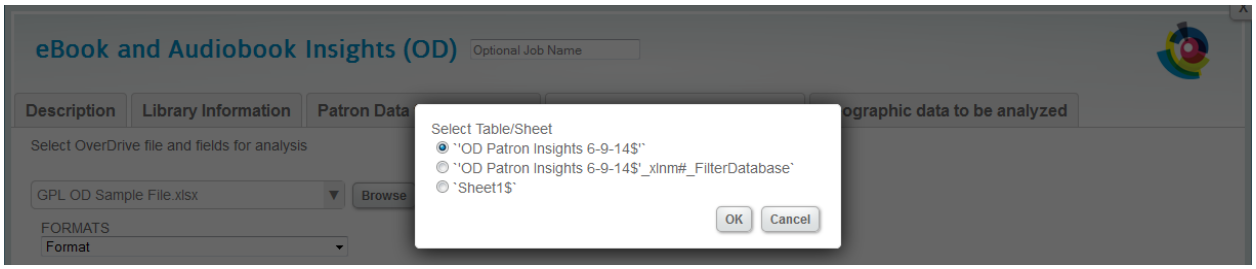
Note: You must have already extracted your input file from your ILS before accessing the app.

It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the app from running properly. If any problems occur during running the app, contact Gale Customer Care.



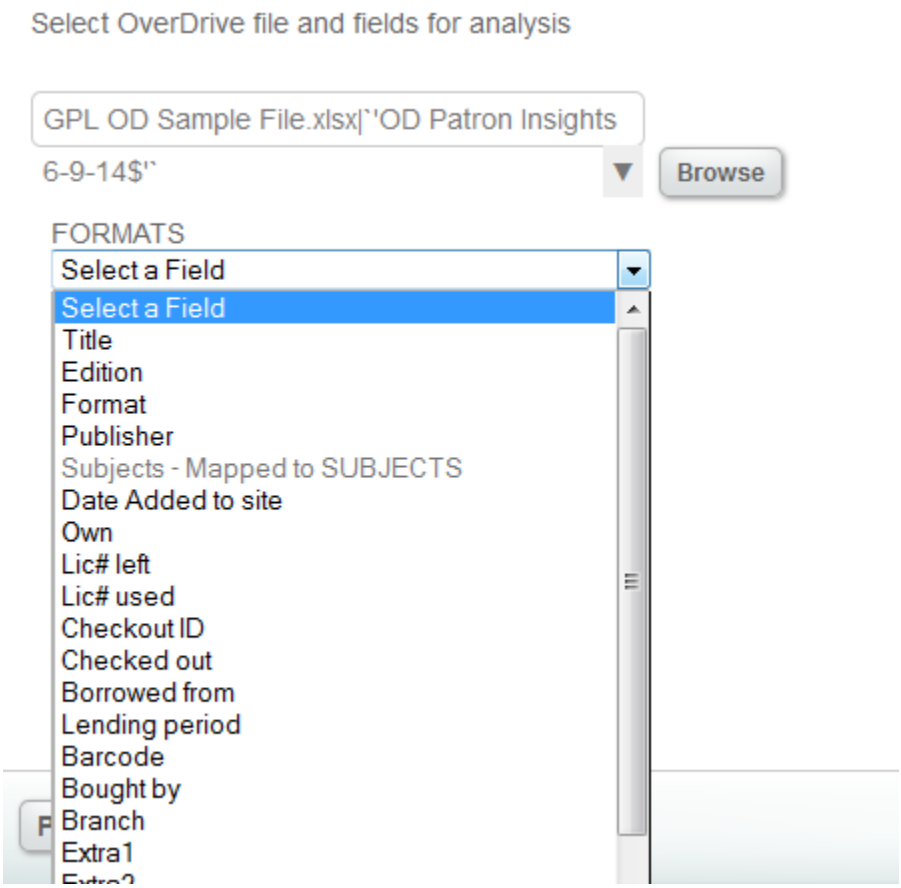
After you select the file, the AOD system asks you to confirm that the spreadsheet it selected from the input file is correct by clicking .

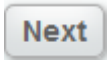
Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



After you have confirmed the selection, AOD loads the file into the app and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (address, checkouts, and active date). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the app has selected the correct columns of data. If not, click the drop-down **Select a field** list to deselect the choice made and replace it with the correct choice.

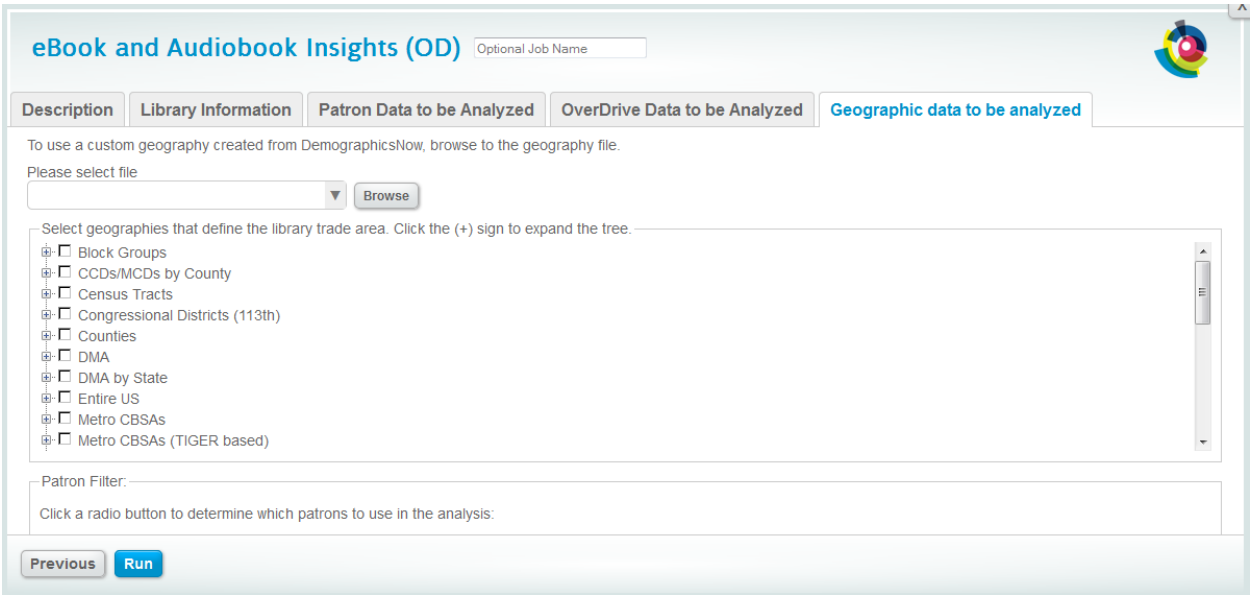
On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.



Click  at the lower left side of the screen to proceed to the next tab.

5.1.6 eBook & audioBook Insights (OD) – Geographic Area to be Analyzed

Your next step is to identify the geographic area you want to analyze. Examples of geographies include a) the library's service area, b) surrounding geographies outside the service area (to analyze patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).

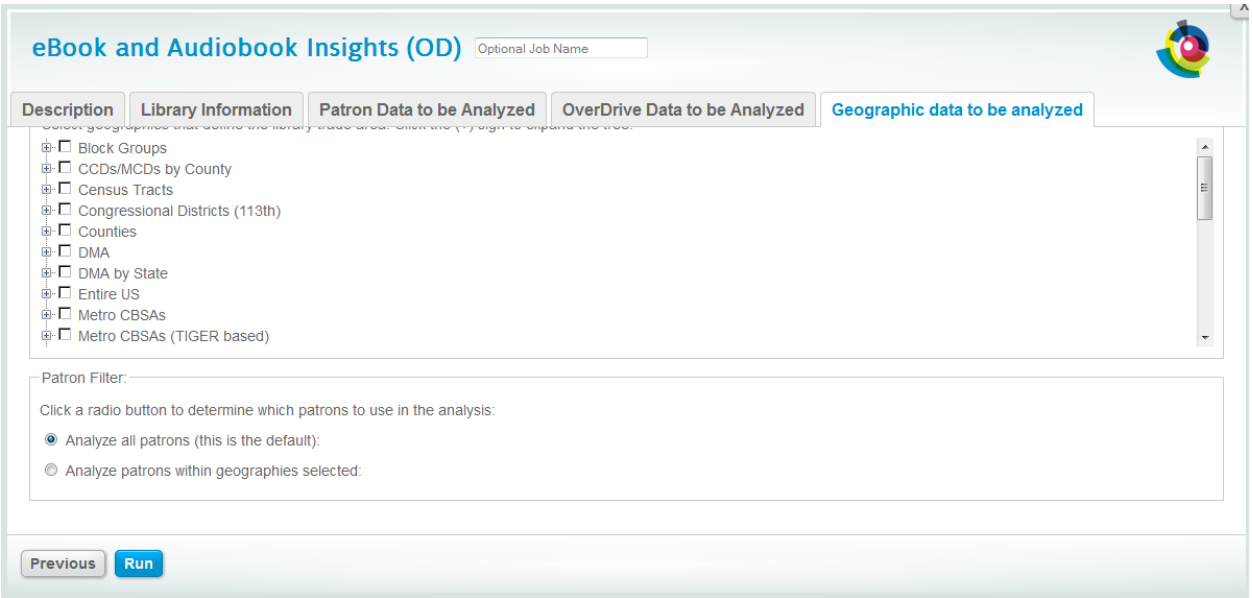

eBook and Audiobook Insights (OD)
Optional Job Name
Description
Library Information
Patron Data to be Analyzed
OverDrive Data to be Analyzed
Geographic data to be analyzed
To use a custom geography created from DemographicsNow, browse to the geography file.
Please select file
Browse
Select geographies that define the library trade area. Click the (+) sign to expand the tree.
Block Groups
CCDs/MCDs by County
Census Tracts
Congressional Districts (113th)
Counties
DMA
DMA by State
Entire US
Metro CBSAs
Metro CBSAs (TIGER based)
Patron Filter:
Click a radio button to determine which patrons to use in the analysis:
Previous
Run

You can select geographies from the geography tree menu or upload a custom geography (GIS) file by first creating a custom geography in Gale's complimentary product, *DemographicsNow for Libraries*. If you are loading a previously saved custom geography from *DemographicsNow for Libraries*, click the Browse button at the top of the screen and locate the **.yxdb file**—the format of the saved *DemographicsNow for Libraries* custom geography file—in the directory and select it by clicking the file. When the file appears in the file window, bypass the geography tree and move to the next filter, which appears after the geography tree.

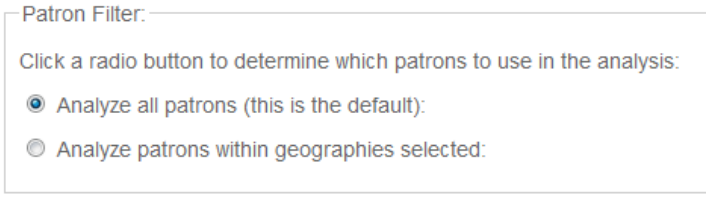
If selecting a geography from the geography tree, first locate the type of geography to be loaded, such as ZIP code, county, block group, census tract, or CBSA. Next, click the **+ sign** to expand the list and continue until you locate the geography you want. If selecting from the geography tree, you may select a single geography selection by clicking the box next to it. (A check mark will appear.) You may select multiple geographies by checking the box next to each one. If you select multiple geographies, they will be combined in the analysis.

Note: If you are interested in a county, do not select all its block groups. The AOD system calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculation may take hours.

After you select a geography, scroll down the screen to the final filter: whether to include or exclude patrons outside the geography selected.

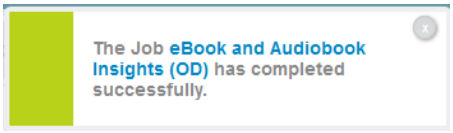


The **patron filter** looks at whether patrons live inside or outside the library service area. The default includes all patrons, regardless of where they live. Clicking **Geo Area Selected Only** includes patron only if their addresses lie within the service area geography you defined earlier.


Patron Filter:
Click a radio button to determine which patrons to use in the analysis:
Analyze all patrons (this is the default):
Analyze patrons within geographies selected:

Setting the patron filer is the final step in this process. Click

on the lower left side of the screen to begin the analysis. When the analysis completes, the following message will appear on screen if you are still logged on:



Please note that it is not necessary to wait until the analysis completes. By clicking

at the upper right side of the screen, you can return to the original app screen and the analysis will run in the background.

You can also log out or execute another AOD app analysis. If you want to make minor modifications and re-run the analysis with a different filter, select the

button at the lower left side of the screen. All your information is saved and you can modify any earlier choices to re-run the analyis.

5.2 eBook & audioBook Insights Maps (OD)

This section provides a detailed description of the *eBook & audioBook Insights Maps (OD)* app. The **Genre Maps** report adds visual immediacy to the data provided by the **OverDrive Analysis** report. It can also be run by itself to enable you to see exactly where borrowers live and identify clusters of potential interest in particular genres.

You can use *the eBook & audioBook Insights (OD) Maps* reports to craft marketing messages, develop targeted marketing lists, configure appropriate OverDrive content material, and identify target areas for promotion.

The application begins with an analysis of the genres that are borrowed by library patrons within the OverDrive platform in total and then breaks the genres down by the different Mosaic lifestyle clusters. The breakouts provide insight into which genres your high-use patrons are borrowing the most.

5.2.1 eBook & audioBook Insights Maps (OD) – Initial Screen

The following screen appears when you click the *eBook & audioBook Insights Maps (OD)* app:

analytics ON DEMAND
GALE CENGAGE Learning
Welcome
Library
Public Gallery
Private Studio
Collections
Collection Intelligence
Patron Profiles
eBook and Audiobook Insights (OD)
+ New Collection
App Results
GALE
analytics
ON DEMAND
eBook and audiobook Insights Maps (OD) v2
Cengage Learning - Mike Weaver
Uploaded 1 month ago
Run: Once
Run
This application provides maps showing the home location of patrons who have checked out materials, arranged by material type and genre. There are three input steps to the application.
In Step 1 the user enters a library name and address.
In Step 2 the user selects the data files to be analyzed.
In step 3 the user has the option to select specific geographies on which to run the analysis, or to run the analysis on all checkout data contained in the input file.
This application produces a .pdf file.
Previous results for this app
Name
Date

This screen provides the following key information:

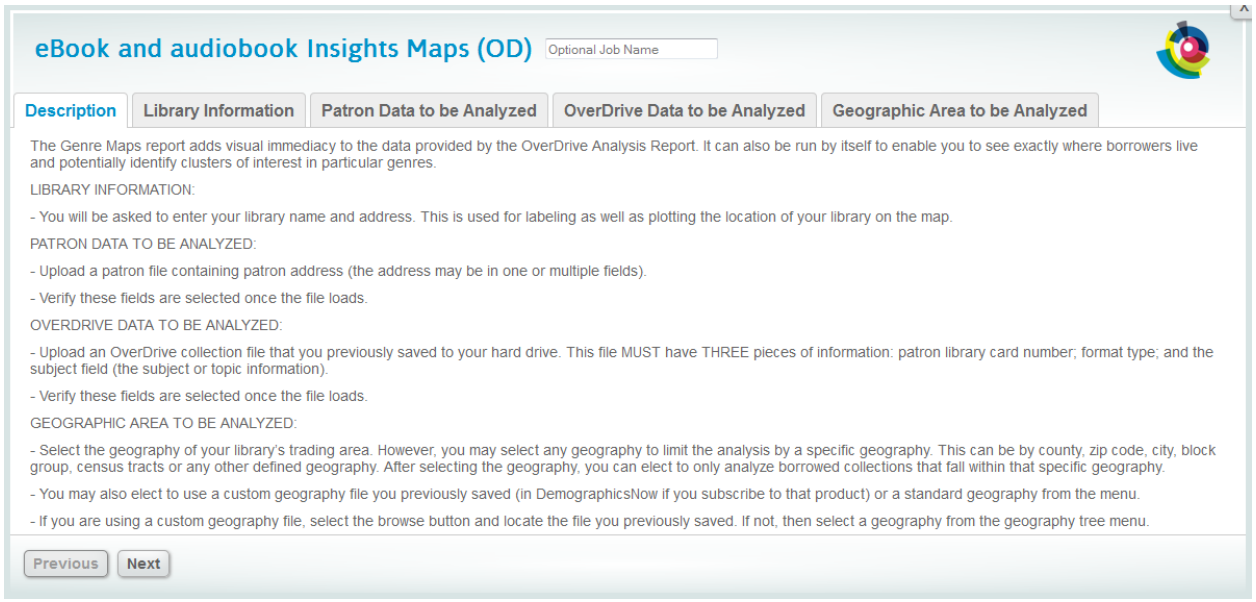
- **Version number** – When the app is modified, the version number increments by one. Modifications may include enhancements, changes that accommodate input data files, and/or error corrections that are uncovered with repeated user access.
- **A summary description of what the eBook & audioBook Insights Maps (OD) app does**: "This application provides maps showing the home location of patrons who have checked out materials, arranged by material type and genre. There are three input steps to the application. In Step 1 the user enters a library name and address. In Step 2 the user selects the data files to be

analyzed. In step 3 the user has the option to select specific geographies on which to run the analysis, or to run the analysis on all checkout data contained in the input file. This application produces a .pdf file."

- **Listing of previous reports** – As discussed in Section 2.2.2, this list includes previous results (that you did not delete) which are currently stored on the Amazon cloud server.

5.2.2 eBook & audioBook Insights Maps (OD) – Description

When you click Run, the following screen appears. Note that the screen displays five tabs. (Some apps may have more or fewer tabs.) The **Description** tab explains what is required to run the app, including a high-level overview of the commands.


eBook and audiobook Insights Maps (OD)
Optional Job Name
Description
Library Information
Patron Data to be Analyzed
OverDrive Data to be Analyzed
Geographic Area to be Analyzed
The Genre Maps report adds visual immediacy to the data provided by the OverDrive Analysis Report. It can also be run by itself to enable you to see exactly where borrowers live and potentially identify clusters of interest in particular genres.
LIBRARY INFORMATION:
- You will be asked to enter your library name and address. This is used for labeling as well as plotting the location of your library on the map.
PATRON DATA TO BE ANALYZED:
- Upload a patron file containing patron address (the address may be in one or multiple fields).
- Verify these fields are selected once the file loads.
OVERDRIVE DATA TO BE ANALYZED:
- Upload an OverDrive collection file that you previously saved to your hard drive. This file MUST have THREE pieces of information: patron library card number; format type; and the subject field (the subject or topic information).
- Verify these fields are selected once the file loads.
GEOGRAPHIC AREA TO BE ANALYZED:
- Select the geography of your library's trading area. However, you may select any geography to limit the analysis by a specific geography. This can be by county, zip code, city, block group, census tracts or any other defined geography. After selecting the geography, you can elect to only analyze borrowed collections that fall within that specific geography.
- You may also elect to use a custom geography file you previously saved (in DemographicsNow if you subscribe to that product) or a standard geography from the menu.
- If you are using a custom geography file, select the browse button and locate the file you previously saved. If not, then select a geography from the geography tree menu.
Previous
Next

This tab allows you to name an output report in the text box located in the upper left portion of the screen:

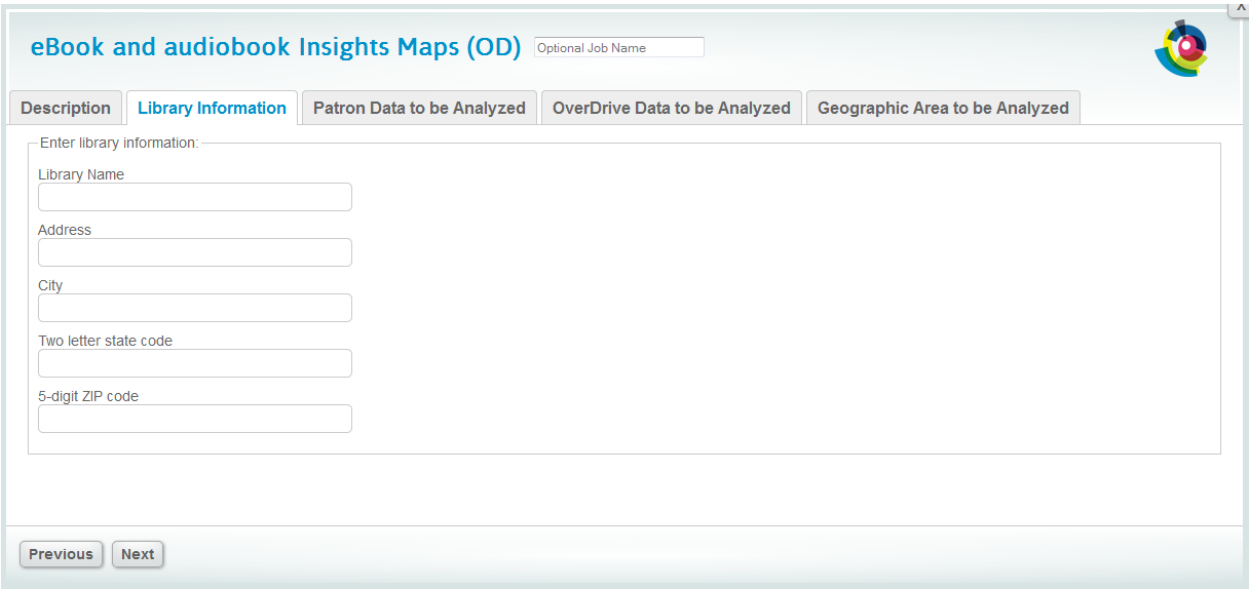
By using unique names, you can easily identify previous runs if you have not deleted them. You can name a report by the options selected or by the date on which it was run.

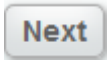
To proceed to the next tab, click the Next button on the lower left side of the screen or the tab at the top of the screen.

5.2.3 eBook & audioBook Insights Maps (OD) – Library Information

The **Library Information** tab provides boxes where you can input the name of your library and its address. This information is used for three purposes:

- To label the report generated
- To identify the spatial GIS point of the library's location in order to map this on map views in the report
- To calculate the drive time for each library patron from home to the library



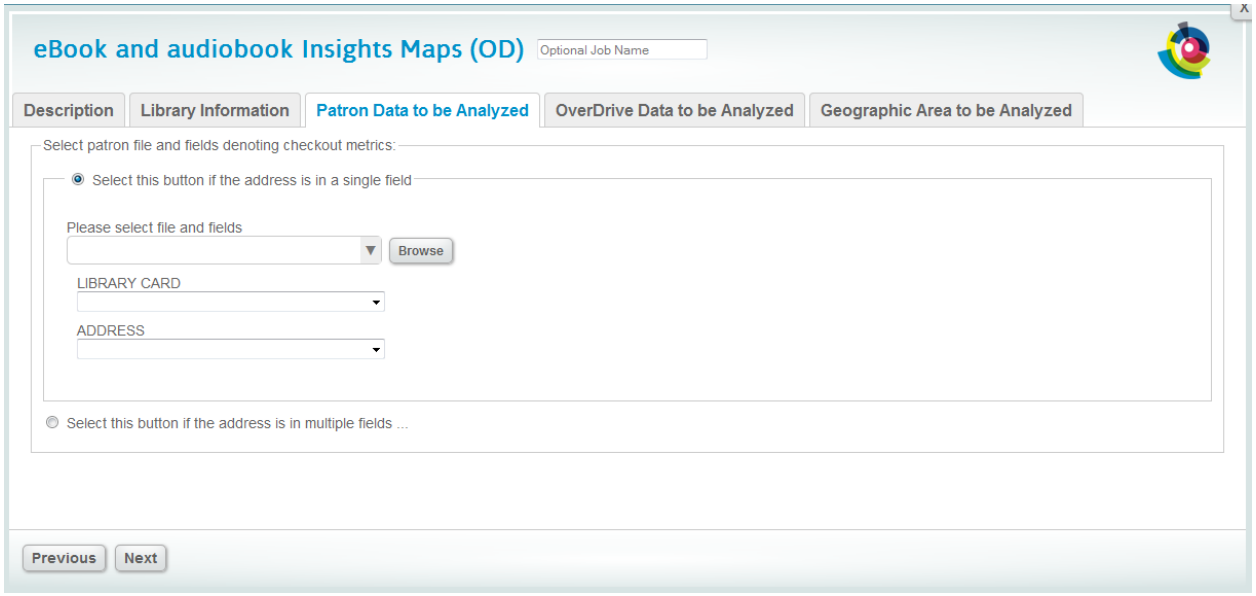
Click  at the lower left side of the screen to proceed to the next tab.

5.2.4 eBook & audioBook Insights Maps (OD) – Patron Data to be Analyzed

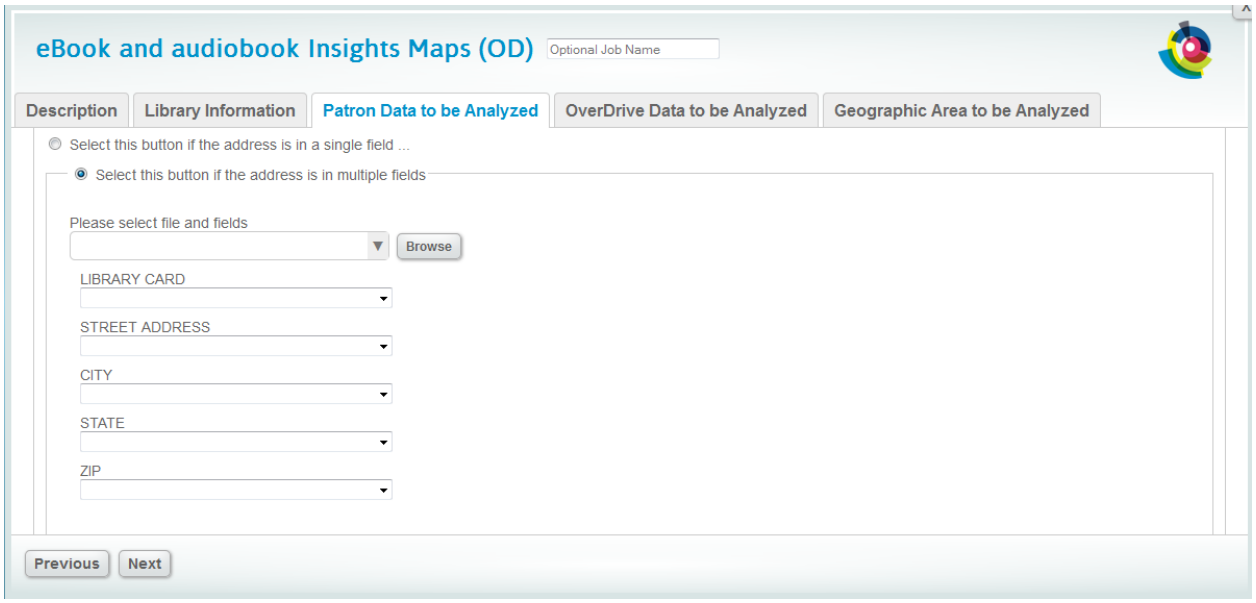
The next tab, **Patron Data to be Analyzed**, is where you upload the patron data file—normally an Excel—from your ILS. This file requires two specific pieces of information to be included: a unique patron identifier (the patron's library card number or OverDrive identifier) and the patron's address.

The following screenshots show data for an input file that includes a patron address. Depending on your ILS, a patron address may be extracted and placed in multiple columns—one or two for street address, one for city, one for state, and one column for ZIP code. The view presented depends on the radio button you choose. (The single-column address view is the default.)

This screen shows the single-column address view.


eBook and audiobook Insights Maps (OD)
Optional Job Name
Description
Library Information
Patron Data to be Analyzed
OverDrive Data to be Analyzed
Geographic Area to be Analyzed
Select patron file and fields denoting checkout metrics:
Select this button if the address is in a single field
Please select file and fields
Browse
LIBRARY CARD
ADDRESS
Select this button if the address is in multiple fields ...
Previous
Next

The following screen shows the multiple-column address view.



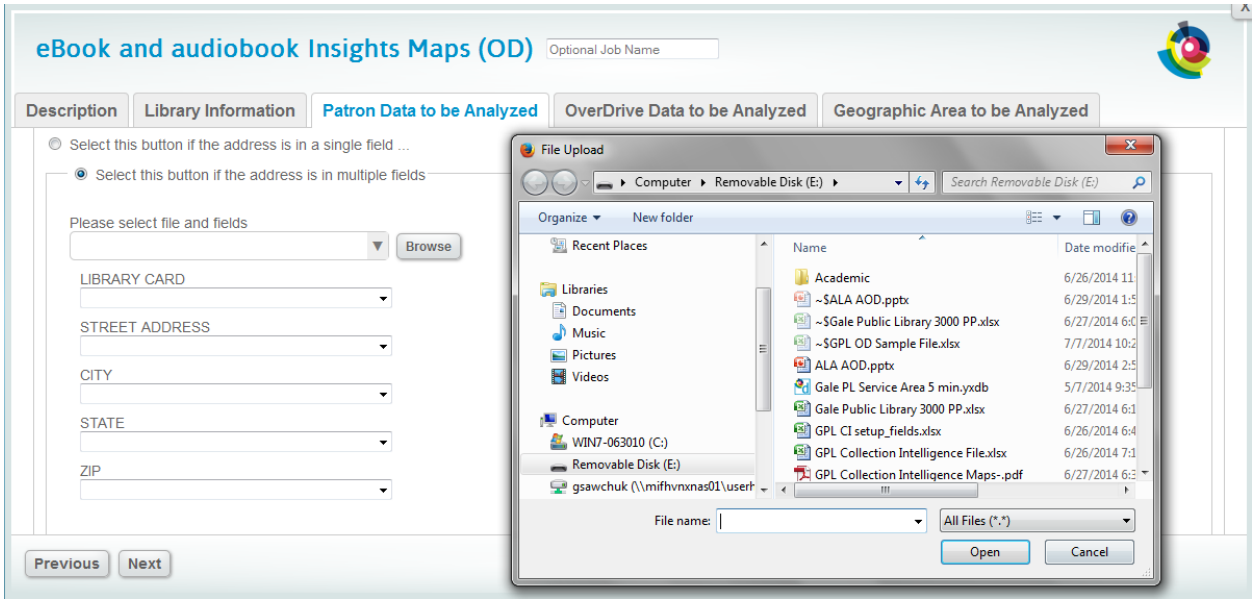
Once you select the address radio button for your input file, the next step is to click the

button to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking **Browse**, a pop-up screen appears and asks you to identify the directory where the input file is located.

Note: You must have already extracted your input file from your ILS before accessing the app.

It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the app from running properly. If any problems occur during running the app, contact Gale Customer Care.

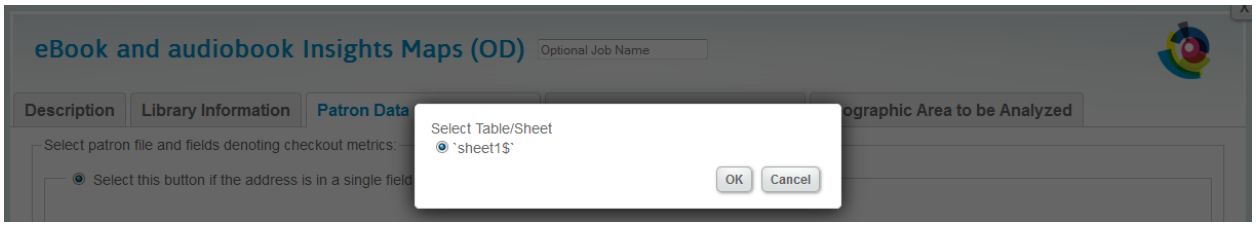
As shown in the following screenshot, when the pop-up screen appears, you must select a file on your hard drive or network drive to upload into AOD.



After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is the correct one by clicking

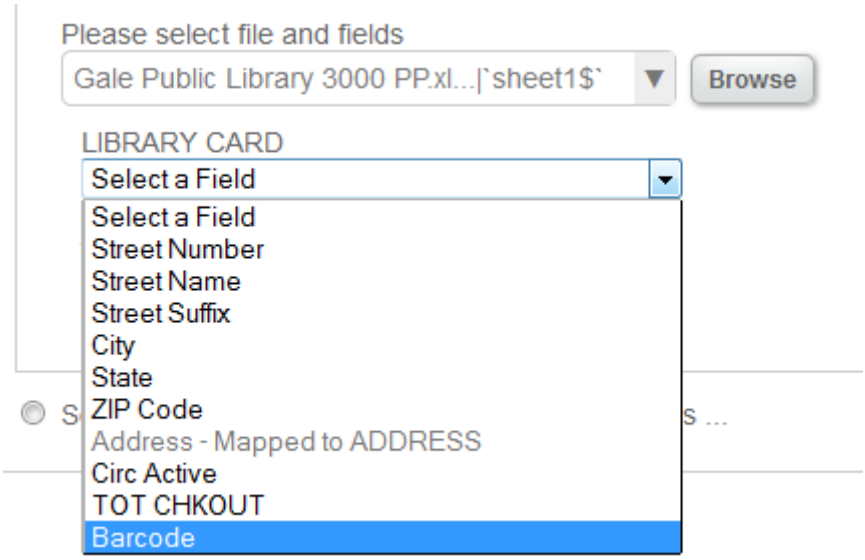
.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



After you have confirmed the selection, AOD loads the file into the app and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (address, checkouts, and active date). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the app has selected the correct columns of data. If not, click the drop-down **Select a field** list to deselect the choice made and replace it with the correct choice.

On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.

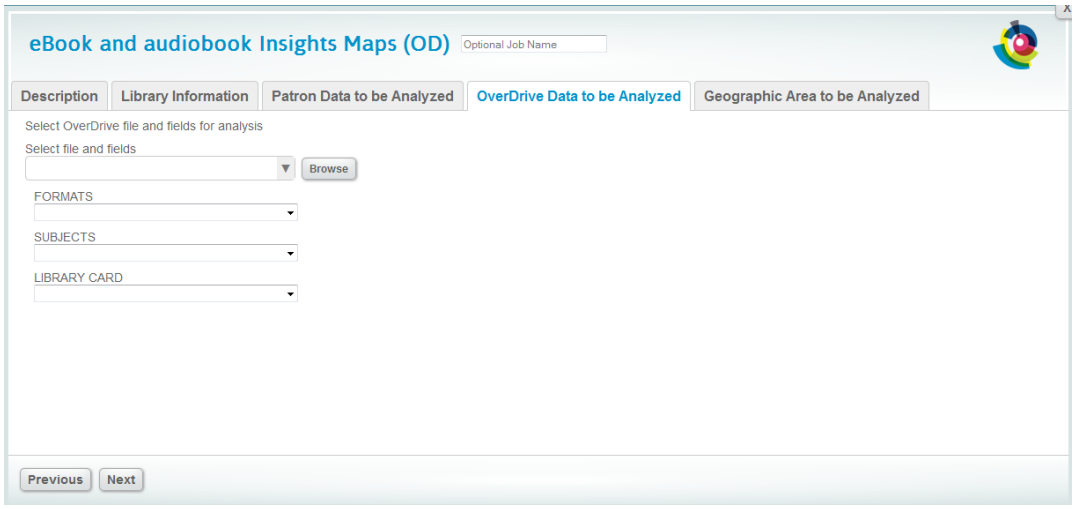


Click Next at the lower left side of the screen to proceed to the next tab.

5.2.5 eBook & audioBook Insights Maps (OD) – OverDrive Data to be Analyzed

Your next step is to upload a data file—typically an Excel file—from your OverDrive System. This file requires three specific pieces of information: a) borrowed item format, b) the subject/genre identifier, which is usually a high level identifier that facilitates returning printed material to the shelf, and c) the unique patron identifier (library card number or OverDrive number if it is also stored in the ILS).

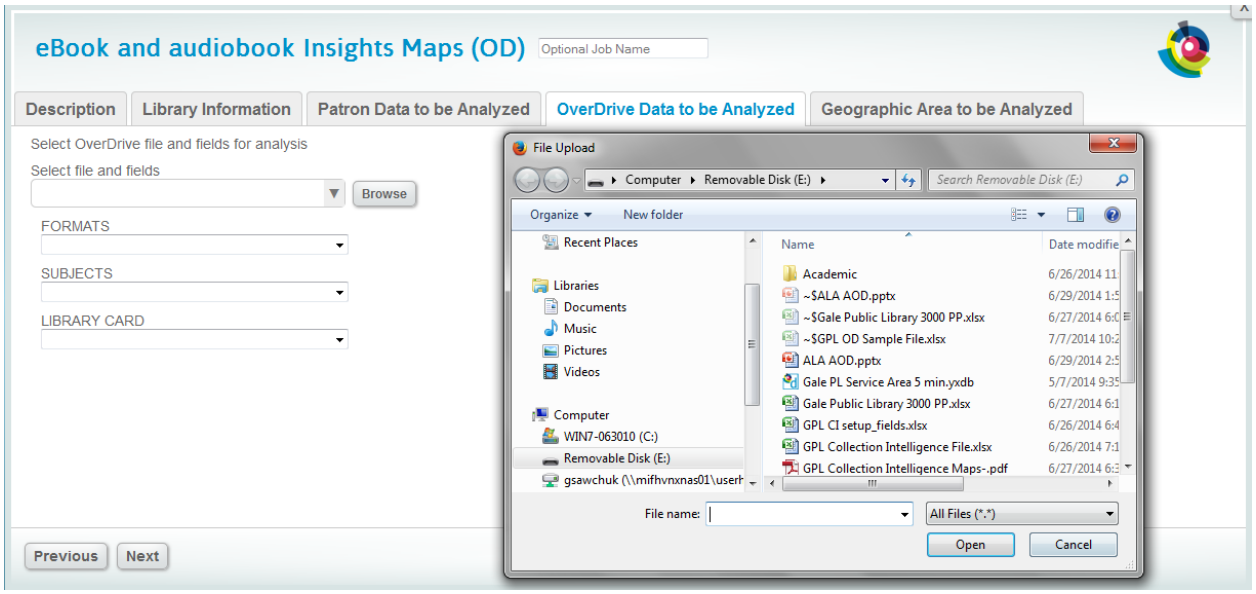
You can choose the types of data to include in the file. For example, it can include any type of format identifier you want to analyze. Or you can use any subject/genre identifier can be used if it exists in the OverDrive system. This capability allows filtering not only by the *eBook &audiobook Insights* app—more on this to follow—but also by the OverDrive extract used to create the AOD input file.



The next step is to click Browse to browse input files located on your hard drive and/or network drive for uploading. This process is very similar to attaching a document to an email. After clicking on browse, a pop up screen is shown asking the user to identify the directory where the input file is located.

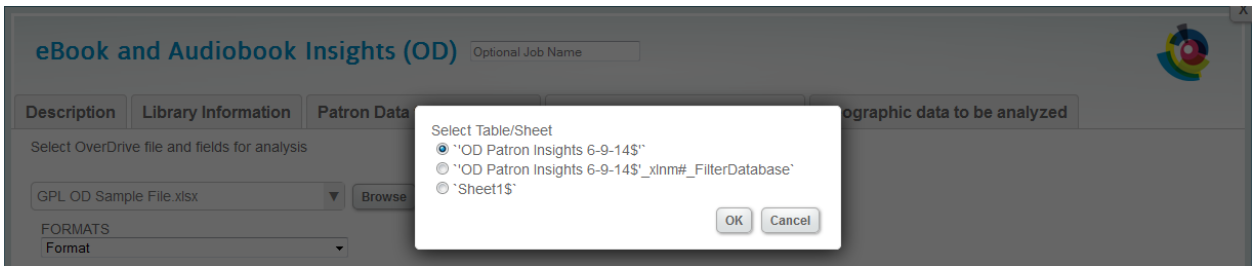
Note: You must have already extracted your input file from your ILS before accessing the app.

It is also critical that the format of the input file is identical to the sample file previously submitted to Gale during the validation phase of ordering. Changing the format may prevent the app from running properly. If any problems occur during running the app, contact Gale Customer Care.



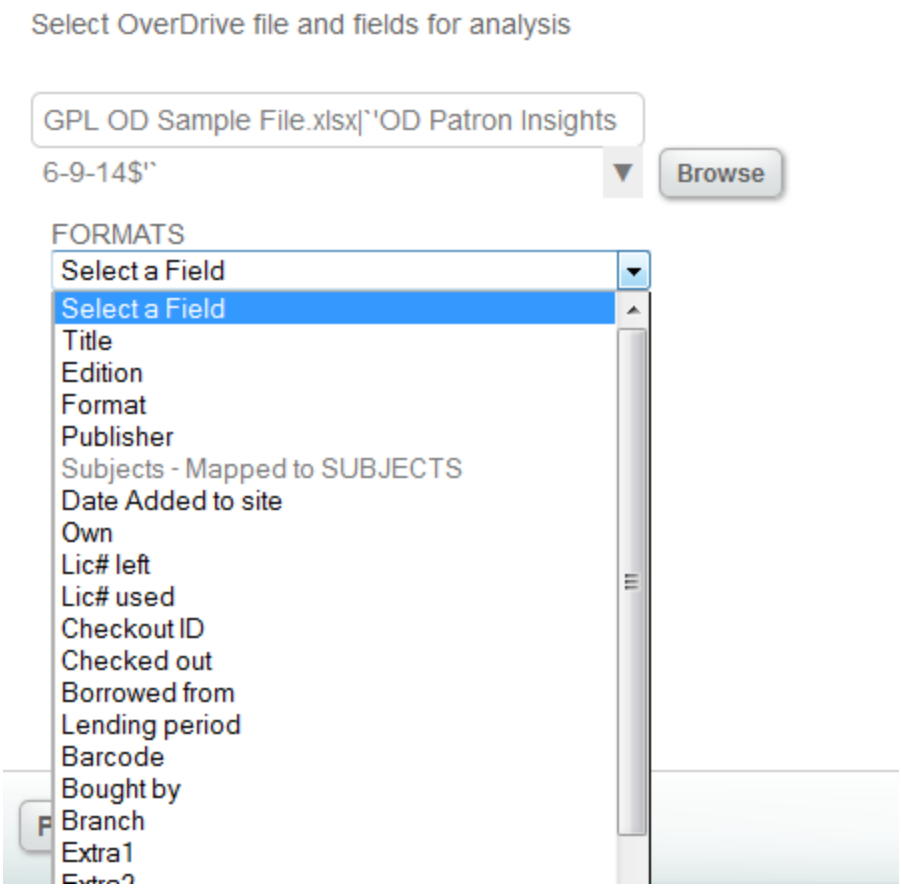
After you select the file, AOD asks you to confirm that the spreadsheet it selected from the input file is the correct one by clicking OK.

Note: Excel workbooks can contain multiple spreadsheets, which is why it is important to confirm the selection.



After Once you have confirmed the selection, AOD loads the file into the app and attempts to match the columnar fields in the input file to the names on each of the fields identified in this tab (address, checkouts, and active date). If the heading in the input file is similar to the descriptive name on the screen AOD auto-selects that column. Verify that the app has selected the correct columns of data. If not, click the drop-down **Select a field** list to deselect the choice made and replace it with the correct choice.

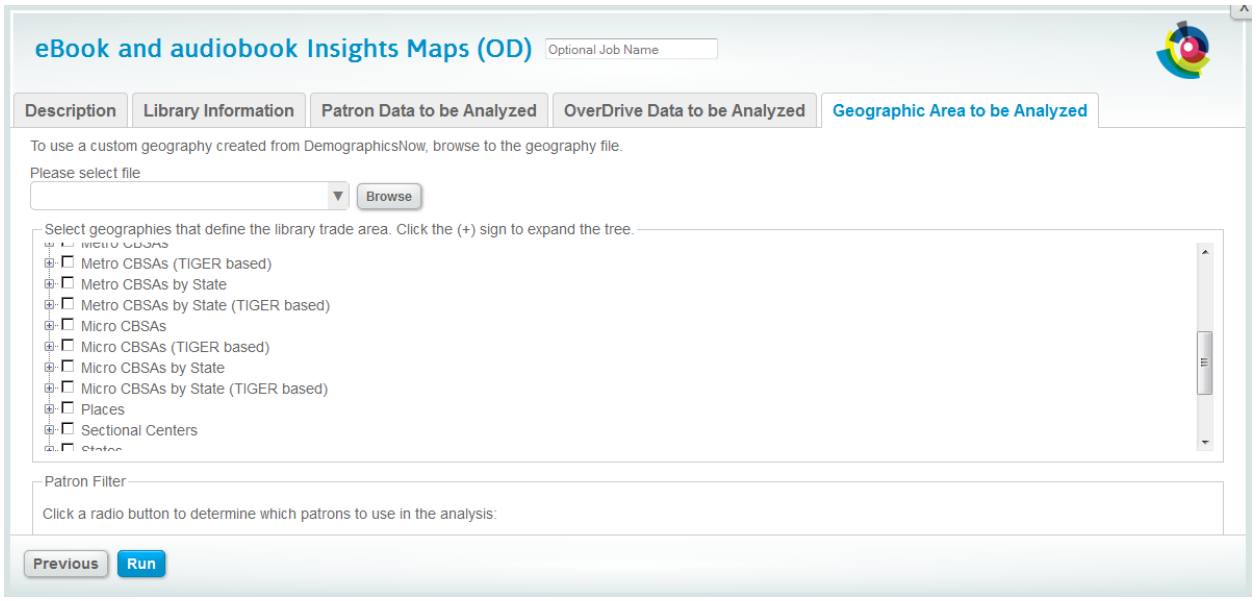
On fields that AOD has not auto-selected, click the drop-down list of the remaining fields and match the correct field in the input file to the required field.



Click on at the lower left side of the screen to proceed to the next tab.

5.2.6 eBook & audioBook Insights Maps (OD) – Geographic Area to be Analyzed

Your next step is to identify the geographic area you want to analyze. Examples of geographies include a) the library's service area, b) surrounding geographies outside the service area (to analyze patrons who use the library but don't reside in the service area, c) smaller geographies, such as census tracts and block groups (to analyze specific neighborhoods).

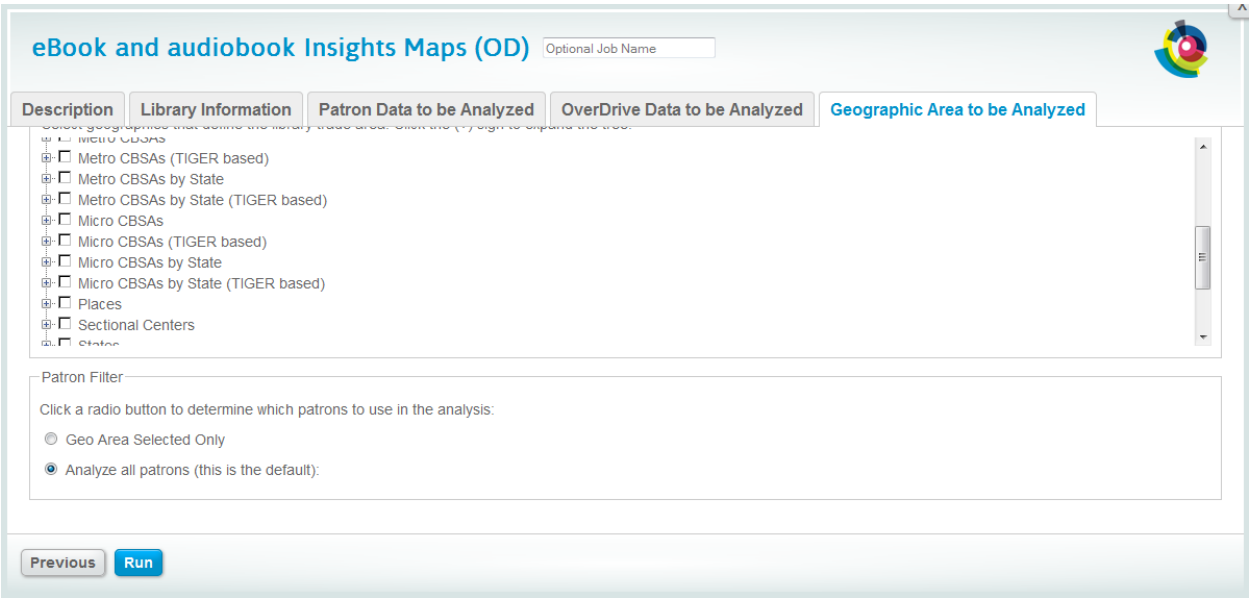

eBook and audiobook Insights Maps (OD)
Optional Job Name
Description
Library Information
Patron Data to be Analyzed
OverDrive Data to be Analyzed
Geographic Area to be Analyzed
To use a custom geography created from DemographicsNow, browse to the geography file.
Please select file
Browse
Select geographies that define the library trade area. Click the (+) sign to expand the tree.
Metro CBSAs (TIGER based)
Metro CBSAs by State
Metro CBSAs by State (TIGER based)
Micro CBSAs
Micro CBSAs (TIGER based)
Micro CBSAs by State
Micro CBSAs by State (TIGER based)
Places
Sectional Centers
Patron Filter
Click a radio button to determine which patrons to use in the analysis:
Previous
Run

You can select geographies from the geography tree menu or upload a custom geography (GIS) file by first creating a custom geography in Gale's complimentary product, *DemographicsNow for Libraries*. If you are loading a previously saved custom geography from *DemographicsNow for Libraries*, click the Browse button at the top of the screen and locate the **.yxdb file**—the format of the saved *DemographicsNow for Libraries* custom geography file—in the directory and select it by clicking the file. Once the file appears in the file window, bypass the geography tree and move to the next filter, which appears after the geography tree.

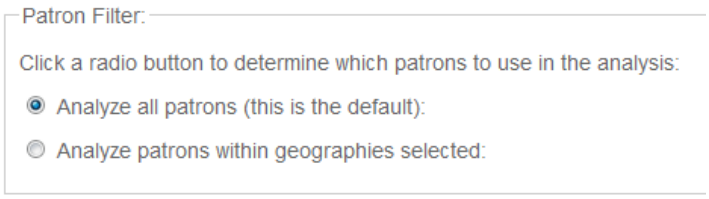
If selecting a geography from the geography tree, first locate the type of geography to be loaded, such as ZIP code, county, block group, census tract or CBSA. Next, click the **+ sign** to expand the list and continue until you locate the geography you want. You may select a single geography selection by clicking the box next to it. (A check mark will appear.) You may select multiple geographies by checking the box next to each one. If you select multiple geographies, they will be combined in the analysis.

Note: If you are interested in a county, do not select all its block groups. The AOD system calculates the smallest geography first and adds each individual selection to it. If you select all its block groups, calculations may take hours.

After you select a geography scroll down the screen and to the final filter: whether to include or exclude patrons outside the geography selected.

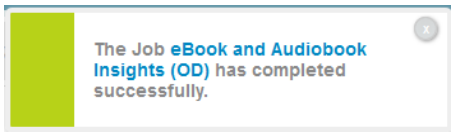

eBook and audiobook Insights Maps (OD)
Optional Job Name
Description
Library Information
Patron Data to be Analyzed
OverDrive Data to be Analyzed
Geographic Area to be Analyzed
Metro CBSAs (TIGER based)
Metro CBSAs by State
Metro CBSAs by State (TIGER based)
Micro CBSAs
Micro CBSAs (TIGER based)
Micro CBSAs by State
Micro CBSAs by State (TIGER based)
Places
Sectional Centers
Patron Filter
Click a radio button to determine which patrons to use in the analysis:
Geo Area Selected Only
Analyze all patrons (this is the default):
Previous
Run

The **patron filter** looks at whether patrons live inside or outside the library service area. The default includes all patrons, regardless of where they live. Clicking **Geo Area Selected Only** includes patron only if their addresses lie within the service area geography you defined earlier.


Patron Filter:
Click a radio button to determine which patrons to use in the analysis:
Analyze all patrons (this is the default):
Analyze patrons within geographies selected:

Setting the patron filer is the final step in this process. Click

on the lower left side of the screen to begin the analysis. When the analysis completes, the following message will appear on screen if you are still logged on:



Please note that it is not necessary to wait until the analysis completes. By clicking

On the upper right side of the screen, you can return to the original app screen and the analysis will run in the background.

You can also log out or execute another AOD app analysis. If you want to make minor modifications and re-run the analysis with a different filter, select the

button at the lower left side of the screen. All your information is saved and you can modify any earlier choices to re-run the analyis.